Trust Questionnaire – 2010

Please ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Fax:	
		Email:	

To: CST Nexia Ltd

Terms of Engagement

We hereby instruct you to prepare our Taxation Returns for the 2010 year. We undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. You are hereby authorised to communicate with my bankers, solicitors, finance companies, government agencies and any other necessary parties to obtain such information as you require in order to carry out the above assignments.

You are also requested to represent us as our tax agent for all tax types.

Signature _______________________________________ Date _________________________

Convenient time to call you is:	
Alternative phone numbers are:	
When do you want your accounts completed by? In order to set an achievable target date for the completion of the work, please tick the box that suits your requirements: ▪ Urgent (we will contact you to agree on a target date) ▪ Within 6 to 8 weeks from commencement ▪ Flexible (we will contact you to agree on a target date)	☐ ☐ ☐
Would you like us to supply a copy to your bank? Yes ☐ No ☐ (Tick One)	If Yes, please provide contact person and address. ____________________ ____________________ ____________________
Please provide details of anything we should be aware of in relation to the preparation of your accounts: ____________________ ____________________ ____________________ ____________________ ____________________	

Records Required	√	**Comment**
Please provide the following information if applicable: ▪ Copies of any new deeds ▪ Details of gifting for the year and supporting documents ▪ Details of sales/purchases of property and supporting documents (settlement statements etc) ▪ Details of sales/purchases of other assets, e.g. boats, caravans etc ▪ Details of any new investments, term deposits, share purchases etc ▪ Details of any sales of investments etc ▪ Interest and dividend statements ▪ Full details of additional beneficiaries ▪ Details of changes in trustees or trustees' details/addresses etc ▪ Details of changes in beneficiaries details/addresses etc ▪ Has any beneficiary become Sui Juris (turned 20 years old) during the year? Which beneficiary?	 ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	

Thank you for completing this questionnaire.
Don't forget to sign it!