



Trust Review Service – Outline

Why we developed this service?

Trusts Deeds are living documents and it is important to make sure they are regularly reviewed and updated. Changes in circumstances and legislation can impact existing Trust structures. Quay Accountants provide this service to ensure your existing Trust reflects your current intentions in the most simplistic structure possible and is in accordance with current statutory requirements.

Who should use this service?

You should have a review if your Trust is more than three-five years old and you haven't updated or reviewed it in the last three years. We also recommend this service if your Trust that has not been reviewed by an accountant or financial adviser, as some of the financial implications of the setup may have been overlooked.

What is involved?

We will require a copy of your Trust Deed and associated documents including Wills to review. We will then have a meeting with you to discuss what you want your trust to deliver and make recommendations accordingly. Based on the outcome of the meeting, we will forward instructions to your lawyer for proposed changes.

When should I begin using this service?

As soon as possible if your Trust has not been reviewed in the last three years or has never been reviewed from a financial perspective.

Call us now on 07 308 4414 (Whakatane) or (Tauranga) 07 578 6069 to discuss your Trust Review



Benefits of a Trust Review Service

- You will receive an independent assessment of your Trust setup
- You will have peace of mind knowing that your Trust is up to date and will deliver your desired outcome
- The most simplistic structure will be proposed to you
- You will have certainty that all assets are protected in accordance with statutory requirements
- It ensures your Trust is compliant with any legislation changes and statutory requirements
- Any potential areas of risk or concern will be highlighted to you
- Any Financial implications of your arrangements will be addressed with you
- All your records will be scanned with electronic back up maintained off site in the event of fire or other event.
- If your Trust enters into a major transaction we can ensure optimal tax structuring and asset protection from the outset
- Quay Accountants will work with you and your lawyer