

# Trust Review Service - Outline

## Why did we develop this service?

Trust 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.

Why did you set up your Trust, and does it reflect your current objectives for it?

- To protect your assets from creditors
- To preserve value for future generations
- To protect your assets from relationship property or family claims
- To protect your assets from the government
- To maximise any benefits you may be entitled to
- To facilitate the transfer of assets to beneficiaries on your death

We 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?

Given the latest changes in legislation in regard to gifting we recommend everyone should take this opportunity to review their Trust to ensure it will deliver their desired outcome, and is being administered correctly.

## What is involved?

Initially 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, or put forward a more detailed proposal for services if required.

## When should I begin using this service?

As soon as possible if you want to ensure your Trust is compliant and will meet your objectives.

***Call us now on 09 421 9020 to discuss your Trust Review***

## Benefits of a Trust Review Service

- An independent assessment of your Trust setup
- Increased understanding of your Trust
- Peace of mind knowing that your Trust is up to date and will deliver your desired outcome (i.e. the Trust is aligned with your intentions)
- Clarity for you as to whether or not to accelerate your gifting programme
- The most simplistic structure will be proposed to you
- Identifies any tax savings opportunities and reduce any potential exposure to Capital Gains tax
- Gives certainty that all assets are protected in accordance with statutory requirements
- 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
- Ensures the Trust supports your objective of succession planning for next generation, including protection against potential relationship property claims.
- If your Trust enters into a major transaction we can ensure optimal tax structuring and asset protection from the outset
- Will avoid the Trust being deemed a sham
- We will work with you and your lawyer