

TRUST QUESTIONNAIRE

(FOR USE BY THE BRUNTON, STRACHAN & KHAN CPA FIRM, CHARTERED)

TO AVOID DELAY WITH YOUR TAX RETURN, PLEASE ANSWER ALL QUESTIONS

1. Name of trust _____

2. Address _____

3. Phone _____ Fax _____
Email _____

4. Is the trust revocable? Yes / No _____
If yes, please do not complete the remainder of this questionnaire.

5. Country of formation _____ Date of formation _____

6. In what country(ies) is the trust considered a resident for income tax purposes? _____

7. Which court system is able to exercise primary supervision over the administration of the trust?

8. Number of trustees _____
Name(s), citizenship(s) and income tax residency(ies) of trustees _____

9. In what country(ies) does the trust have any investments, activities or other assets including real estate? _____

10. Please attach a copy of the trust documents.

Signed _____ Telephone Number _____

Print Name _____ Fax Number _____

Email _____

PLEASE RETURN TO: THE BRUNTON, STRACHAN & KHAN CPA FIRM, CHARTERED
4710 NW BOCA RATON BLVD., #101, BOCA RATON, FL 33431
Tel: (561) 241-9991 Fax: (561) 241-6332 Email: tax@taxintl.cpa Website: www.taxintl.cpa