

# TRUST QUESTIONNAIRE

(FOR INTERNAL USE ONLY BY ABITOS, CPAs AND ADVISORS,  
FORMERLY KNOWN AS THE BRUNTON, STRACHAN & KHAN CPA FIRM)

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

1. Name of Trust \_\_\_\_\_
  2. Address \_\_\_\_\_  
\_\_\_\_\_
  3. Phone \_\_\_\_\_ Fax \_\_\_\_\_  
E-Mail \_\_\_\_\_
  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 \_\_\_\_\_  
E-Mail \_\_\_\_\_

PLEASE RETURN TO:

**ABITOS, CPAs AND ADVISORS**  
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