



## Connectworks Trust and Estate Precedents

Category	Doc No	Title/Description
Trust Workflows	CHKL1	Annual Review Checklist
	CHKL2	Annual Review Workflow
	CHKL4	Appointment of Appointor
	CHKL3	Appointment of Beneficiary
	CHKL5	Appointment of Trustee
	CHKL6	Changing Name of Trust
	CHKL7	Death of a Trustee
	CHKL8	Distribution to Beneficiary
	CHKL9	Removal of Beneficiary
	CHKL10	Resettlement of Trust
	CHKL11	Retirement and Appointment of Trustee
	CHKL12	Retirement of Trustee
	CHKL13	Settlement of Trust
	CHKL16	Trust Investment Workflow
	CHKL17	Trusts Act 2019 Review Workflow
	CHKL14	Variation of Trust Deed
	CHKL15	Winding up of Trust
	CHKL18	Removal of Trustee
	CHKL19	Trusts Act 2019 beneficiary disclosure guidance
	CHKL20	Trusts Act 2019 requirements summary
	CHKL21	Appointment of Special Trust Adviser
	CHKL22	Disclosure of Requested Trust Information
	CHKL23	Disclosure of Basic Trust Information
Estates	PR 1	Affidavit for obtaining grant of probate (single applicant)
	PR1.1	Affidavit for obtaining grant of probate (multiple applicants)
	PR 2	Affidavit for obtaining grant of letters of administration with will annexed (single applicant)
	PR 2.1	Affidavit for obtaining grant of letters of administration with will annexed (multiple applicants)
	PR 3	Affidavit for obtaining grant of administration on intestacy to surviving partner
	PR 4	Affidavit for obtaining grant of administration on intestacy to daughter or son of deceased (single applicant)
	PR 4.1	Affidavit for obtaining grant of administration on intestacy to daughter or son of deceased (multiple applicants)
	PR 5	Affidavit for obtaining grant of administration on intestacy to parent of deceased (single applicant)
	PR 5.1	Affidavit for obtaining grant of administration on intestacy to parent of deceased (multiple applicants)
	PR 6	Affidavit for obtaining grant of administration on intestacy to brother or sister of deceased (single applicant)
	PR 6.1	Affidavit for obtaining grant of administration on intestacy to brother or sister of deceased (multiple applicants)
	PR 7	Probate in common form
	PR 8	Letters of administration with will annexed
	PR 9	Letters of administration on intestacy
	PR 10	Caveat
	PR 11	Exemplification of probate or letters of administration
PR 12	Affidavit of valid execution	
Trust	1.1	Deed Establishing Trust (multiple Settlers)
	1.1.1	Deed Establishing Trust (named Appointors - multiple Settlers)
	1.1.2	Deed Establishing Trust (with Protector - multiple Settlers)
	1.2	Deed Establishing Trust (one Settlor)
	1.2.1	Deed Establishing Trust (named Appointors - single Settlor)
	1.2.2	Deed Establishing Trust (with Protector - single Settlor)
	1.3	Deed of Variation of Trust Deed
	1.4	Deed of Variation of Trust Deed (Previous Variations)
		Deed Varying Duration of Trust
	s30	Trust Act 2019 Deed of Variation s30 (Duty to Invest Prudently)
	s31	Trust Act 2019 Deed of Variation s31 (Duty not to exercise power for own benefit)
	s37	Trust Act 2019 Deed of Variation s37 (Duty to act for no reward)
		Deed of Variation Trust Act 2019
	1.5	Deed of Appointment of Vesting Date
	1.6	Deed of Variation of Trust Deed (Income Capitalisation)
	1.7	Deed of Distribution and Winding up of Trust
	Res 1.1	Initial Resolution
	Res 1.2	Resolution to Change Name of Trust
	Res 1.3	Resolution to Wind up Trust
	Res 1.4	Resolution to Use Connectworks
	Res 12	Resolution to disclose Basic Trust Information
	Res 12.1	Resolution to disclose Basic Trust Information to some beneficiaries
	Res 12.2	Resolution to disclose requested trust information, seeking costs (optional)
Res 12.3	Resolution to not disclose requested trust information	

<b>Settlor</b>	2.1	Letter of Wishes (multiple settlors)
	2.2	Letter of Wishes (one settlor)
<b>Trustee</b>	3.1	Deed of Appointment of Trustee (single Trustee, multiple Appointors)
	3.1.1	Deed of Appointment of Trustees (multiple Trustees, multiple Appointors)
	3.2	Deed of Appointment of Trustee (single Trustee, single Appointor)
	3.2.1	Deed of Appointment of Trustees (multiple Trustees, single Appointor)
	3.3	Deed of Appointment of Trustee following the death of a Trustee (multiple Appointors)
	3.4	Deed of Appointment of Trustee following the death of a Trustee (single Appointor)
	3.5	Deed of Retirement of Trustee
	3.5.1	Deed of Retirement of Trustees
	3.6	Deed of Retirement of Trustee and Appointment of Trustee (multiple Appointors)
	3.6.1	Deed of Retirement and Appointment of Trustees (multiple Appointors)
	3.7	Deed of Retirement of Trustee and Appointment of Trustee (single Trustee, single Appointor)
	3.7.1	Deed of Retirement and Appointment of Trustees (multiple Trustees, single Appointor)
	3.8	Deed of Removal of Trustee (multiple Appointors)
	3.9	Deed of Removal of Trustee (single Appointor)
		Draft letter to trustees re Trusts Act 2019 (short)
		Draft letter to trustees re Trusts Act 2019 (long)
	Res 3.4	Resolution of Removal of Trustee
	Res 3.5	Resolution of Retirement
	Res 3.6	Resolution of Appointment
	Res 3.7	Resolution of Retirement and Appointment of Trustee
		Computershare - Change of Trustee Names Notification
		Link Mark Services - Change of Trustees
IRD436	IRD436 - Qualifying Company Re-elections	
	IRD Letter notifying Appointment of Trustee	
	IRD Letter notifying Change of Trustee	
	IRD Letter notifying Death and Appointment of Trustee	
	IRD Letter notifying Death of Trustee	
	IRD Letter notifying Retirement and Appointment of Trustee	
	Trusts Act 2019 meeting discussion points	
<b>Beneficiary</b>	4.1	Deed of Appointment of Beneficiary (multiple settlors)
	4.1.1	Deed of Appointment of Beneficiaries (multiple settlors)
	4.1.2	Deed of Appointment of a Class of Beneficiaries
	4.2	Deed of Appointment of Beneficiary (one settlor)
	4.2.3	Deed of Appointment of Beneficiary by Protector
	4.3	Deed of Removal of Beneficiary (multiple settlors)
	4.3.1	Deed of Removal of Beneficiaries
	4.3.2	Deed of Removal of Class of Beneficiaries
	4.4	Deed of Removal of Beneficiary (one settlor)
	Res 4.1	Resolution of Income Distribution
	Res 4.2	Resolution of Capital Distribution
	Res 4.5	Resolution to provide Guarantee of Beneficiary
	Res 4.6	Resolution to provide Guarantee of Beneficiary with Security
	Res 4.7	Resolution to occupy Trust property
		Trusts Act 2019 Draft Letter to Beneficiaries
	Draft Letter to Beneficiary advising change of trustee	
<b>Appointor</b>	5.1	Deed of Appointment of Appointor (multiple appointors)
	5.1.1	Deed of Appointment of Appointors
	5.2	Deed of Appointment of Appointor (one appointor)
	10.1	Deed of Appointment of Special Trust Adviser (multiple appointors)
	10.2	Deed of Appointment of Special Trust Adviser (single appointor)
<b>Debt/Loan</b>	6.1	Deed of Acknowledgement of Debt (multiple lenders)
	6.2	Deed of Acknowledgement of Debt (one lender)
	6.3	Deed of release of Debt (multiple Lenders)
	6.4	Deed of Satisfaction of Debt (one Lender)
	6.5	Deed of Partial Release of Debt (multiple Lenders)
	6.6	Deed of Partial Satisfaction of Debt (one Lender)
	6.7	Deed of Assignment of Debt (multiple Lenders)
	6.8	Deed of Assignment of Debt (one Lender)
	6.9	Deed of Novation of Debt (multiple Lenders)
	6.10	Deed of Novation of Debt (single lender)
	6.11	Deed of Acknowledgement of Debt (trust as lender)
	6.12	Deed of Acknowledgement of Debt (Trust as lender) (one borrower)
	Res 6.1	Resolution to Borrow Money
	Res 6.2	Resolution to Lend Money
<b>Gifting</b>	7.1	Deed of Partial Forgiveness of Debt (multiple donors)
	7.2	Deed of Partial Forgiveness of Debt (one donor)
	7.3	Deed of Forgiveness of Debt (multiple donors)
	7.4	Deed of Forgiveness of Debt (one donor)
	7.5	Deed of Gift (multiple donors)
	7.6	Deed of Gift (one donor)
	7.7	Deed of Gift (Real Estate) (multiple donors)
	7.8	Deed of Gift (Real Estate) (one donor)
	7.9	Deed of Gift (Real Estate subject to Mortgage) (multiple donors)
	7.10	Deed of Gift (Real Estate subject to Mortgage) (one donor)
	7.11	Declaration of Solvency
	7.12	Certificate of Solvency
Res 7.1	Resolution Receiving Gift (Single Donor)	

	Res 7.2 Res 7.3 Res 7.4	Resolution Receiving Gift (Multiple Donors) Resolution Receiving Gift by Forgiveness (Single Donor) Resolution Receiving Gift by Forgiveness (Multiple Donors)
<b>Resettlement</b>	8.1 Res 8.1 Res 8.2	Deed of Resettlement Resolution of Resettlement (Disposing Trust) Resolution of Resettlement (Receiving Trust)
<b>Sale and Purchase</b>	9.1 9.2 9.3 9.4 9.5 9.6 9.7 9.8 9.9 9.10 Res 9.1 Res 9.2 Res 9.3 Res 9.4 Res 9.5 Res 9.6 LINZ	Agreement for Sale and Purchase of Real Estate (multiple vendors) Agreement for Sale and Purchase of Real Estate (one vendor) Agreement for Sale and Purchase of Real Estate Subject to Mortgage (multiple vendors) Agreement for Sale and Purchase of Real Estate Subject to Mortgage (one vendor) Agreement for Sale and Purchase of Company Shares (multiple vendors) Agreement for Sale and Purchase of Company Shares (one vendor) Agreement for Sale and Purchase of Personal Property (multiple vendors) Agreement for Sale and Purchase of Personal Property (one vendor) Deed of Nomination (multiple purchasers) Deed of Nomination (one purchaser) Resolution to Purchase Real Estate Resolution to Purchase Company Shares Resolution to Purchase Personal Property Resolution to sell Real Estate Resolution to sell Company Shares Resolution to sell Personal Property Land Transfer Tax Statement
<b>Investment</b>	Res 10.1 Res 10.2 Res 10.3	Resolution relating to Investment Resolution to adopt Investment Strategy Rebalance Investments
<b>Accounting</b>	Res 11.1 Res 11.2 Res 11.3 Res 11.4	Resolution to Accept Annual Accounts (short) Resolution to Accept Annual Accounts (long) Resolution to Register for Income Tax Resolution to Register for GST
<b>Other</b>	NDA EPA1	Confidentiality Agreement (NDA) Certificate of non-revocation and non-suspension of enduring power of attorney Trust Clauses
<b>Clauses</b>	Trust	Establishment of Trust Appointment of Lawyer Appointment of Accountant Appointment of Bank Appointment of Investment Advisor Conflict of Interest (continue to act as trustee) Conflict of Interest (excluded as a trustee) Ratification Use Connectworks Change of Trust Name Variation of Trust Deed Appointment of Vesting Date Resettlement (all assets) (disposing) Resettlement (part) (disposing) Resettlement (receiving) Wind up Trust
	Trustee	Appointment of Trustee Appointment and Retirement of Trustee Removal of Trustee Limitation of Trustee Liability
	Beneficiary	Appointment of Beneficiary Consideration of Beneficiaries Removal of Beneficiary Accumulation of Income Accumulation of Income (part) Occupy Trust Property Guarantee (no security) Guarantee (security)
	Beneficiary Disclosure	Have Considered Making Trust Information Available No Outstanding Requests Resolved to Disclose Information Resolved to Withhold Trust Information
	Sale and Purchase	Engage Real Estate Agent Sell Real Estate Purchase Real Estate Accept nomination to purchase Real Estate Offer to Purchase Real Estate Purchase Company Shares Sell Company Shares Purchase Personal Property Sale Personal Property
	Gift	Accept gift

	Accept gift by Forgiveness (All) Accept gift by Forgiveness (Part)
Debt/Loan	Acknowledgment of Debt Satisfaction of Debt Partial Satisfaction of Debt Borrow Money
Accounting	Approval of Annual Accounts Approval of Tax Return
Investment	Adopting an Investment Strategy Implementing the Investment Strategy Investment Sell Investments
Distributions	Capital Distribution Income Distribution