



Connectworks Trust and Estate Precedents, July 2020

Category	Doc No	Title/Description
Trust Workflows		Annual review checklist
		Appointment of appointor
		Appointment of beneficiary
		Appointment of trustee
		Changing name of trust
		Death of a trustee
		Distribution to beneficiary
		Removal of beneficiary
		Resettlement of trust
		Retirement and appointment of trustee
		Retirement of trustee
		Settlement of trust
		Trust review workflow 2020
		Variation of trust deed
	Winding up of trust	
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 spouse, civil union partner, or de facto 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
	AA Life Cover	Life Claim Form
	AMP	Deceased Kiwisaver Member Withdrawal Application Form
	ANZ	Estate Funds Release and Indemnity Form
	ANZ	Identification by Certified Copy for Individual Form
	Aon	Application for Withdrawal of Kiwisaver Death Benefit Form
	ASB Life	Death Claim Form (Joint Owner)
	ASB Life	Death Claim Form (Sole Owner)
	Asteron	Life Claim Form
	BNZ	Deceased Estate Kiwisaver Withdrawal Form
	BNZ	Deceased Estates Indemnity and Claim Form
	Computershare	Deceased Estate Checklist
	Computershare	Estate Transfer
	Computershare	Intestacy Request and Transfer
	Fisher Funds	Deceased Kiwisaver Member Withdrawal Form
	Forsyth Barr	Kiwisaver Scheme Death of Saver Form
	Grosvenor Financial Services	Kiwisaver Withdrawal due to Death of a Member
	Link Market Services	Deceased Estate Administration Guide
	Link Market Services	Deceased Estate Administration Questionnaire - Individual
	Link Market Services	Deceased Estate Administration Questionnaire - Joint
	Link Market Services	Estate Transmission
	Link Market Services	Request for Transmission (Surviving Joint Holders)
	Link Market Services	Small Estate Statement, Indemnity and/or Transmission
	Link Market Services	Small Intestate Statement, Indemnity and/or Transmission
	Link Market Services	Statutory Declaration and Indemnity of Next of Kin
	Mercer	Kiwisaver Death Claim Form
Partners Life	Life Claim Form	
Smartshares	Application for Kiwisaver Death Benefit Probate Withdrawal	
Sovereign	Death Claim Form (Joint Owner)	
Sovereign	Death Claim Form (Sole Owner)	
Westpac	Claim Indemnity Form	
Westpac	Claim Indemnity Form for Contents of a Deposit Box	

	Westpac	Kiwisaver Scheme Estate Withdrawal Form
	Westpac	Retirement Plan Withdrawal Form
Trust	1.1	Deed Establishing Trust (multiple settlors)
	1.1.1	Deed Establishing Trust (named Appointors - multiple settlors)
	1.1.2	Deed Establishing Trust (with Protector - multiple settlors)
	1.2	Deed Establishing Trust (one settlor)
	1.2.1	Deed Establishing Trust (named Appointors - one settlor)
	1.2.2	Deed Establishing Trust (with Protector - one settlor)
	1.3	Deed of Variation of Trust Deed
	1.4	Deed of Variation of Trust Deed (Previous Variations)
	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	
Settlor	2.1	Letter of Wishes (multiple settlors)
	2.2	Letter of Wishes (one settlor)
Trustee	3.1	Deed of Appointment of Trustee (multiple appointors)
	3.1.1	Deed of Appointment of Trustees (multiple appointors)
	3.2	Deed of Appointment of Trustee (one appointor)
	3.2.1	Deed of Appointment of Trustee (one appointor)
	3.3	Deed of Appointment of Trustee following the death of a Trustee (one appointor)
	3.4	Deed of Appointment of Trustee following the death of a Trustee (multiple appointor)
	3.5	Deed of Retirement of Trustee
	3.5.1	Deed of Retirement of Trustees
	3.6	Deed of Retirement and Appointment of Trustee (multiple appointors)
	3.6.1	Deed of Retirement and Appointment of Trustees (multiple appointors)
	3.7	Deed of Retirement and Appointment of Trustee (one appointor)
	3.7.1	Deed of Retirement and Appointment of Trustees (one appointor)
	3.8	Deed of Removal of Trustee (multiple Appointors)
	3.9	Deed of Removal of Trustee (one Appointer)
		Draft letter to trustees re Trusts Act (short)
		Draft letter to trustees re Trusts Act (long)
	Res 3.1	Resolution of Directors Accepting Appointment as Trustee
	Res 3.2	Resolution of Directors Approving Major Transaction
	Res 3.3	Resolution of Shareholders Approving Major Transaction
	Res 3.4	Resolution of Removal of Trustee
	Res 3.5	Resolution of Retirement of Trustee
	Res 3.6	Resolution of Appointment of Trustee
	Res 3.7	Resolution of Retirement and Appointment of Trustee
	Computershare	Change of Trustee Names Notification
	Link Market Services	Change of Trustees
	IRD	IRD Form IR436 Qualifying Company Re-elections
	IRD	IRD Letter notifying Appointment of Trustee
IRD	IRD Letter notifying Change of Trustee	
IRD	IRD Letter notifying Death and Appointment of Trustee	
IRD	IRD Letter notifying Death of Trustee	
IRD	IRD Letter notifying Retirement and Appointment of Trustee	
Beneficiary	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 (multiple settlors)
	4.2	Deed of Appointment of Beneficiary (one settlor)
	4.2.3	Deed of Appointment of Beneficiary by Protector (one settlor)
	4.3	Deed of Removal of Beneficiary (multiple settlors)
	4.3.1	Deed of Removal of Beneficiaries (multiple settlors)
	4.3.2	Deed of Removal of Class of Beneficiaries (multiple settlors)
	4.4	Deed of Removal of Beneficiary (one settlor)
	Res 4.1	Resolution of Income Distribution
	Res 4.2	Resolution of Capital Distribution
	Res 4.3	Resolution to provide Guarantee of Beneficiary
	Res 4.4	Resolution to provide Guarantee of Beneficiary with Security
	Res 4.5	Resolution to occupy Trust property
		Trusts Act 2019 beneficiary disclosure guidance
	Trusts Act- Draft Letter to Beneficiaries	
Appointor	5.1	Deed of Appointment of Appointor (multiple appointors)
	5.1.1	Deed of Appointment of Appointors (multiple appointors)
	5.2	Deed of Appointment of Appointor (one appointor)
Debt/Loan	6.1	Deed of Acknowledgement of Debt (multiple lenders)
	6.2	Deed of Acknowledgement of Debt (one lender)
	6.3	Deed of Satisfaction of Debt (multiple lender)
	6.4	Deed of Satisfaction of Debt (one lender)
	6.5	Deed of Partial Satisfaction of Debt (multiple lender)
	6.6	Deed of Partial Satisfaction of Debt (one lender)
	6.7	Deed of Assignment of Debt (multiple lender)
	6.8	Deed of Assignment of Debt (one lender)
	6.9	Deed of Novation of Debt (multiple lender)

	6.10	Deed of Novation of Debt (one lender)
	6.11	Deed of Acknowledgement of Debt (trust as lender) (multiple borrowers)
	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
Gifting	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	Resolution Receiving Gift (Multiple Donors)
	Res 7.3	Resolution Receiving Gift by Forgiveness (Single Donor)
	Res 7.4	Resolution Receiving Gift by Forgiveness (Multiple Donors)
Resettlement	8.1	Deed of Resettlement
	Res 8.1	Resolution of Resettlement (Disposing Trust)
	Res 8.2	Resolution of Resettlement (Receiving Trust)
Sale and Purchase	9.1	Agreement for Sale and Purchase of Real Estate (multiple vendors)
	9.2	Agreement for Sale and Purchase of Real Estate (one vendor)
	9.3	Agreement for Sale and Purchase of Real Estate subject to a mortgage (multiple vendors)
	9.4	Agreement for Sale and Purchase of Real Estate subject to a mortgage (one vendors)
	9.5	Agreement for Sale and Purchase of Company Shares (multiple vendors)
	9.6	Agreement for Sale and Purchase of Company Shares (one vendor)
	9.7	Agreement for Sale and Purchase of Personal Property (multiple vendors)
	9.8	Agreement for the Sale and Purchase of Personal Property (one vendor)
	9.9	Deed of Nomination (multiple purchasers)
	9.10	Deed of Nomination (one purchaser)
	Res 9.1	Resolution to Purchase Real Estate
	Res 9.2	Resolution to Purchase Company Shares
	Res 9.3	Resolution to Purchase Personal Property
	Res 9.4	Resolution to sell Real Estate
	Res 9.5	Resolution to sell Company Shares
	Res 9.6	Resolution to sell Personal Property
	LINZ	Land Transfer Tax Statement
Investment	Res 10.1	Resolution relating to Investment
	Res 10.2	Resolution to adopt Investment Strategy
	Res 10.3	Rebalance Investments
Accounting	Res 11.1	Resolution to Accept Annual Accounts (short)
	Res 11.2	Resolution to Accept Annual Accounts (long)
	Res 11.3	Resolution to Register for Income Tax
	Res 11.4	Resolution to Register for GST
Other	Confidentiality Agreement (NDA)	Confidentiality Agreement (NDA)
Clauses	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)
	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
	Gifting	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