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***Trusts: record keeping tips and legal requirements***

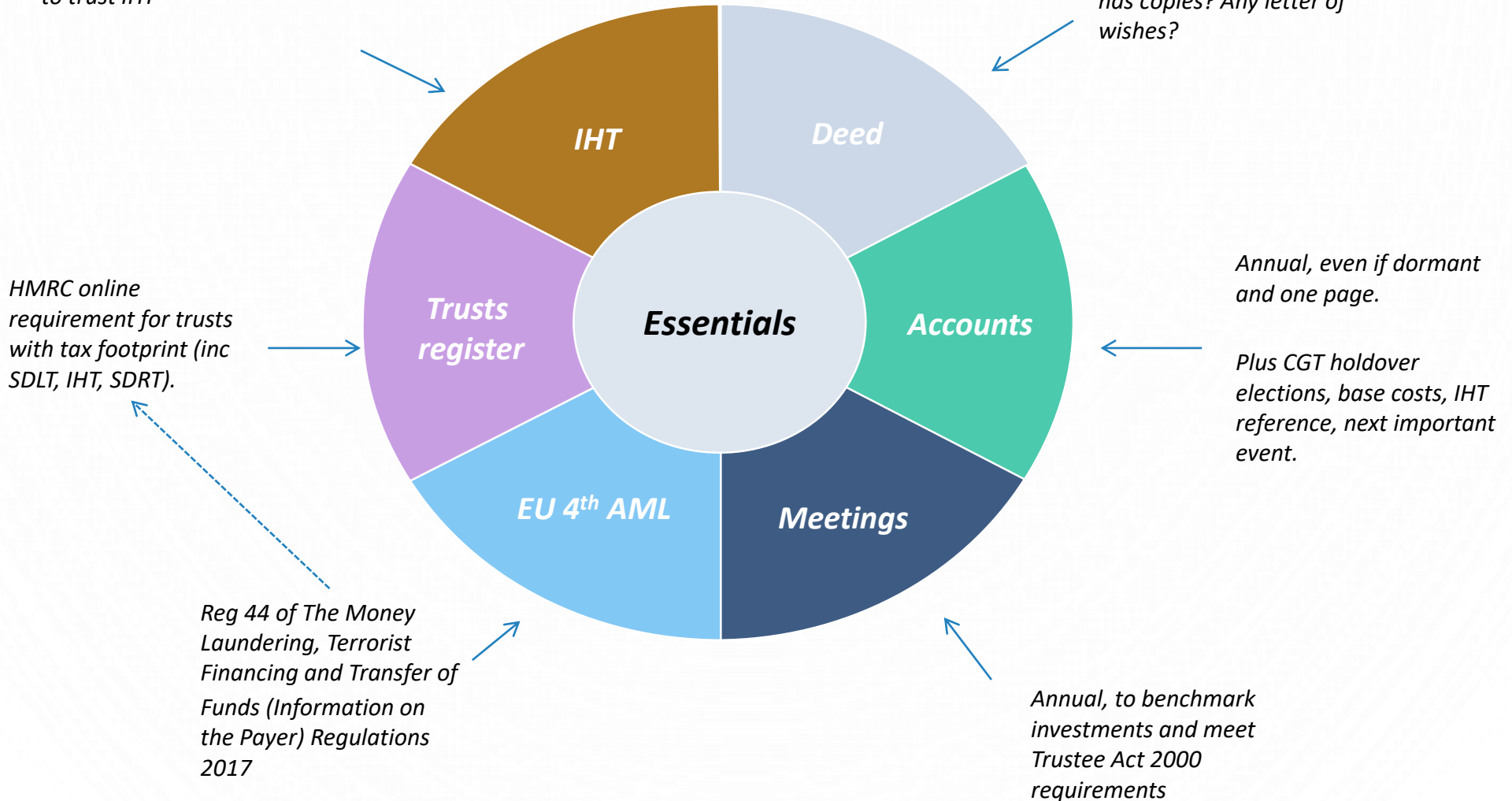
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# Trusts record keeping

Watch out for 10 year charges, after 2006 changes to trust IHT

Where is the original? Who has copies? Any letter of wishes?



## *Conclusion and questions*

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**Summary:** more administrative requirements but good reasons to meet your clients

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Family business owners, trustees,  
beneficiaries, entrepreneurs,  
'non-doms', inherited wealth

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