

# TRUST MANAGEMENT TIMELINE

## STANDARD TIMELINE\*

\*Timeline estimations may be extended due to circumstances outside the control of the trustee and/or beneficiaries.



### WEEK 1 – TRUST VESTS

On notification of passing of the life tenant.



### WEEK 2 – BENEFICIARY DETAILS ESTABLISHED

Contact beneficiaries to confirm name and contact details.



### WEEK 3-4 – PREPARATION OF SCHEME OF APPROPRIATION

Details of beneficiary entitlements prepared and verified.



### WEEK 5-7 – FINAL SCHEME OF APPROPRIATION

Beneficiary identification verified, including preliminary tax estimate.



### WEEK 8-10 – INTERIM DISTRIBUTION

Interim distributions made and scheme provided to beneficiaries.



### WEEK 11 – FINALISATION

Equity Trustees will call you or your client to follow up the draft Estate Plan within 10 business days and make amendments.



**Equity Trustees**

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