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Trustees' disclosure obligations in Guernsey: Requests from beneficiaries

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All trustees will have had some experience of dealing with requests for trust information from beneficiaries. While more often than not these will be routine in nature, they can be the precursor to complaints by beneficiaries which in some cases can lead to litigation. Given the stakes, it is important that trustees properly understand their disclosure obligations so they can determine when and if they should provide the information sought.

We have put together a straightforward step-by-step guide of the issues to consider when approaching an information request from beneficiaries of a Guernsey discretionary trust.

If you need any support or advice on this matter, please get in touch with us.

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