

FILED MAR 6 '07

SENATE FILE 364

BY JOHNSON

Passed Senate, Date _____ Passed House, Date _____

Vote: Ayes _____ Nays _____ Vote: Ayes _____ Nays _____

Approved _____

A BILL FOR

1 An Act relating to the discovery of certain trust information by
2 a party which is relevant to the subject matter of a pending
3 civil action.

4 BE IT ENACTED BY THE GENERAL ASSEMBLY OF THE STATE OF IOWA:

SF 364 JUDICIARY

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1 Section 1. Rule of civil procedure 122, Iowa court rules,
2 third edition, is amended by adding the following new
3 paragraph:

4 NEW PARAGRAPH. bb. TRUST INFORMATION. The court may, in
5 its discretion, order a trustee to provide, on behalf of the
6 trust, information including, but not limited to, trust
7 documents and financial statements, relating to any beneficial
8 interest a party to the pending action may have in the trust.

9 EXPLANATION

10 This bill amends rule of civil procedure 122, relating to
11 the scope of discovery in civil proceedings. The bill
12 provides the court with the discretion to order a trustee to
13 provide, on behalf of the trust, information relating to any
14 beneficial interest a party to a pending civil action may have
15 in the trust.

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