

633.700 Intermediate report of trustees.

Unless specifically relieved from so doing, by the instrument creating the trust, or by order of the court, the trustee shall make a written report, under oath, to the court, once each year, within ninety days of the close of the reporting period, and more often, if required by the court. Such report shall state:

1. The period covered by the report.
2. All changes in beneficiaries since the last previous report.
3. Any changes in investments since the last previous report, including a list of all assets, and recommendations of the trustee for the retention or disposition of any property held by the trustee.
4. A detailed accounting for all cash receipts and disbursements, and for all property of the trust, unless such accounting shall be waived in writing by all beneficiaries.

[C66, 71, 73, 75, 77, 79, 81, § 633.700]

2005 Acts, ch 3, §105; 2007 Acts, ch 134, §18, 28

2007 amendment to unnumbered paragraph 1 applies to annual reports for court-supervised trusts due on or after September 30, 2007; 2007 Acts, ch 134, §28