

Discretionary Trust

Please complete the form below – once complete the documents will be available for download in the My Account Menu

PLEASE DO NOT USE THE '&' SYMBOL IN ANY RESPONSE

Document Name *

This will be the name of the zip file that is produced

Trust Name *

Refrain from using 'protected words' eg Bank or Royal and or crude words.

Trust Start Date *

Which Jurisdiction's laws apply to the Trust Deed *

The following considerations are relevant when choosing a jurisdiction:

the place of administration of the trust;

the place where the assets of the trust are situated;

the place of business or residence of the trustees; and

the objects or purposes of the trust and the place where they are to be fulfilled.

If this question becomes relevant in the future, the parties' intention will not be determinative of the issue of jurisdiction but it may be relevant.

Trustee Company/Individual Name *

We recommend that the Trustee of your Family Trust is a corporate trustee – Please have a corporate trustee setup before you order this product (please see your accountant if you need further advice)

Trustee Company ACN

Please complete if Trustee is a company.

Trustee Address *

Please put full address street, suburb, state and postcode

Directors of Trustee Company

Directors Full Name or Individual Trustee Full Name *

Settled Amount *

This generally \$100

Settlor *

Usually a close relative or your accountant or lawyer

Settlor cannot be a beneficiary of the Trust

Settlor Address *

24 Example St Example Town NSW 2000

Please put full address street, suburb, state and postcode

Appointor *

Is the person that has the power to appoint and remove the Trustee, also referred to as Guardian, Protector or Principal

Appointer Address *

24 Example St Example Town NSW 2000

Please put full address street, suburb, state and postcode

Principal Beneficiary *

eg. The main Beneficiary is usually the family member starting the trust for example Yourself, your wife, y

1. Included as Beneficiaries will be your spouse, de facto partner, children.
2. The spouses, de facto partners and children of each of those children and their descendants.
3. Any company, wherever incorporated or having its corporate office, in which any of the persons mentioned in clauses 1 and 2 holds shares or is a director; and
4. Any trust of which any of the persons mentioned in clauses 1 and 2 is a beneficiary, whether discretionary, contingent or vested.

Chairman *

Usually the Principal Beneficiary

Confirm your entries are correct and ready to submit? *

Yes