

**DISCRETIONARY TRUST DETAILS (family Trust)**

Name of Trust: \_\_\_\_\_

Date of Trust: \_\_\_\_\_

Address: \_\_\_\_\_

Name of all Trustees: \_\_\_\_\_

If Trustee is a Company name & ACN \_\_\_\_\_

Names of ALL Directors \_\_\_\_\_

Appointor of Trust (*Parties with power to appoint and/or remove Trustee/s*) \_\_\_\_\_

Full Name of Settlor: \_\_\_\_\_

Street Address of Settlor: \_\_\_\_\_

Settlement Sum: \$10.00 or \_\_\_\_\_

**SPECIFIED BENEFICIARIES**

FOR FAMILY TRUST ONLY BENEFICIARIES *A standard "Remoter issue" clause is contained within the Trust deed and should be sufficient for all contingencies*

1. Full Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

2. Full Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

3. Full Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

4. Full Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

**DEFAULT BENEFICIARIES** (If no nomination is made all specified beneficiaries are installed)

1. Full Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

2. Full Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

3. Full Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

4. Full Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

**Exclude foreign persons as beneficiaries?\***  YES  NO

***\*The Trust could be liable for premium stamp duty on residential purchases, land tax surcharge and capital gains tax withholding tax on sales of properties if foreign beneficiaries are NOT excluded***

**PAYMENT OPTIONS** Approved 30 day account clients \$258

**Credit Card** - Please debit the following credit card by \$257.00 (includes merchant fee)

TYPE OF CARD: Visa  Mastercard  Bankcard

CARD NUMBER: \_\_\_\_\_ EXPIRY DATE: ( / / )

NAME ON CARD: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

**Direct Deposit - \$248.00** BSB: 012 349 ACC#: 221 604 238 Account Name: Allans off the Shelf

**PLEASE COMPLETE** Date: \_\_\_/\_\_\_/\_\_\_ Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Delivery Address: \_\_\_\_\_