



NEW DISCRETIONARY TRUST INSTRUCTION SHEET

TRUST NAME

Full Name of Trust :

.....

Governing State:

.....

SETTLOR

Full name of Settlor:

Street address of Settlor

(As the settlor cannot be a beneficiary under the trust, we cannot accept a settlor who is a family member who the trustee may later want to benefit. The preferred settlor is often a family friend or associate)

Settled Sum (preferably over \$10) \$

TRUSTEE

Name and ACN of Trustee

Or full names of individual Trustee/s

Officeholders of Trustee Company (if applicable)

1..... Dir/Sec 2..... Dir/Sec

3..... Dir/Sec 4..... Dir/Sec

Street address of Trustee/s (not a PO Box):

.....

.....State & postcode

BENEFICIARIES

Full names and street addresses of Primary Beneficiaries (Usually husband and wife. NB: children of the named primary beneficiaries are automatically included).

.....

..... Postcode

.....

..... Postcode

APPOINTOR/S

Full names and street addresses of Joint Appointor/s * (Please specify the gender if unclear)

.....

..... Postcode

.....

..... Postcode

Full name and street addresses of Independent Appointer/s ** (If any)

.....

..... Postcode

*Joint appointers have the right of survivorship meaning that (unless the appointers otherwise unanimously determine) as one dies or is otherwise removed, their powers of appointment go to the remaining joint appointers and so on until there is effectively the 'last man standing'. Then either his or her legal personal representative becomes the appointer.

**Independent appointers (such as an accountant, solicitor or family friend) assist until with powers of appointment, but can never be with the sole appointer.

ACKNOWLEDGMENT

In placing this order I acknowledge that:

1. It is my responsibility to ensure that the information I am supplying is correct.
2. If new documents have to be prepared as a result of errors in the information a further fee will be payable.
3. Trojan Accounting is not giving legal advice in arranging for the supply of these documents and that if I require legal advice in relation to this matter that will be arranged separately.
4. The documents I will receive are in a standard form prepared by solicitors.
5. Stamp duty may apply in relation to this product. Trojan Accounting is not liable for advising on stamp duty, paying the stamp duty or arranging for lodgment of the documents for stamping.
6. The documentation for the trust will be prepared on the instructions contained in this order form.

I hereby request that you set up the above named discretionary trust on my behalf and understand that the cost of establishment is \$550 which is payable prior to commencement of work by Trojan Accounting.

Signed Date / /

Name of Applicant

Phone Email

Please return completed forms to Trojan Accounting admin@trojanaccounting.com.au