

DISCRETIONARY TRUST

1. Settlor Details

If the Settlor is a company, please provide registered office address, ACN and whether the company has the power to settle a trust.

NOTE that the Settlor can not be the same as the Trustee nor can the Settlor be a beneficiary.

Full Name/s	
Address	

2. Trustee Details

If the Trustee is a company, please provide registered office address, ACN and name/address of all of the directors.

NOTE that under our standard trust deed the Trustee is excluded as a beneficiary to avoid possible adverse NSW stamp duty consequences on a change of trustee. Please let us know whether you require us to reverse this exclusion and allow the Trustee to be a beneficiary.

If individual trustee

Full Name/s	
Address	
Relationship	

If company trustee

Company Name	
ACN	
Registered Address	
Directors Full Name/s	
Director/s Address	
Relationship	
Is it a sole director company?	Yes <input type="checkbox"/> No <input type="checkbox"/>

3. Initial Settlement Sum

The amount paid by the Settlor to the Trustee to establish the Trust. We recommend that the settled sum should be paid by cheque to the Trustee.

The Initial Settlement Sum	
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4. The Income Beneficiaries

Wide range of persons including companies, trusts and charities who may receive distributions of income of the Trust. The income beneficiaries are usually the principal beneficiaries (eg husband and wife), relatives of the principal beneficiaries (eg children, grandchildren, parents, brothers and sisters, spouses etc) and companies and trusts associated with any of the income beneficiaries. If you wish to use our standard clause, please provide full names of the principal beneficiaries. Please indicate whether you require charities to be included as income beneficiaries.

Full Name/s	
Relationship	

5. The Default Beneficiaries

Beneficiaries who are entitled to the income of the Trust if the Trustee does not exercise its discretion to distribute income. The default income beneficiaries are usually the principal beneficiaries and their children in equal shares.

Full Name/s	
Relationship	

6. The Capital Beneficiaries

Wide range of persons including companies, trusts and charities who may receive distributions of the capital of the Trust. The capital beneficiaries are usually the same as the income beneficiaries. Please indicate whether you require charities to be included as capital beneficiaries.

Full Name/s	
Relationship	

7. The Default Capital Beneficiaries

Beneficiaries who are entitled to the capital of the Trust if the Trustee does not exercise its discretion to distribute the capital. The default capital beneficiaries are usually the same as the default income beneficiaries.

Full Name/s	
Relationship	

8. Trust

Name of Trust	
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9. Appointor

The appointor's consent is required to vary the trust deed and add/delete beneficiaries. The appointor also has the power to remove and appoint trustees. The appointor is usually one or both of the principal beneficiaries.

Appointor of the Trust	
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10. Foreign Persons as Beneficiaries

Exclude Foreign persons as beneficiaries for land tax and stamp duty purposes?

Yes No