INSTRUCTION SHEET TO ESTABLISH A DISCRETIONARY TRUST

Delivery Instructions

☐   **Please email documents to the following address:**

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┌─────────────────────────────────────────────────────────────┐
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└─────────────────────────────────────────────────────────────┘
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☐   **Please send completed documents to:**

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Payment Instructions (please tick):

☐   **$400 by email**

☐   **$525 by post**

☐   **$45 Munro / $65 for Non-Munro Revenue NSW stamping** *(where we attend to stamping the Deed we will send you a Revenue NSW Notice of Assessment for you to pay $510 stamp duty directly)*

☐   **Excluding Foreign persons** (*where the Trust holds or is acquiring Residential Land, then any person or entity amongst the class of beneficiaries that is deemed to be a Foreign Person is excluded*)

☐   **Not excluding foreign persons**

☐   **Please send me a RapidPay reference number for payment prior to delivery**

☐   **Please charge my credit card**

Credit Card	Bankcard	☐	Visa	☐	Mastercard	☐
(We are unable to process American Express or Diners)						
Card No.						
Expiry Date						
Credit Card CCV No.						
(Last 3 digits after card no. on front or reverse of card – we cannot process your payment without this number)						
Name on Card						
Amount	$					
Cardholder's Signature						
Where you pay our account by credit card, a surcharge equal to the amount of the merchant's fee may be added and you agree to pay such surcharge.						

Please print clearly.

Name of the Settlor

The Settlor cannot be a beneficiary of the trust.
The Settlor should ideally be a family friend.
The Settlor is required to make a gift of $10.00, sign the deed and has no further involvement in the trust.

Address of the Settlor

Name of the Trustee

ACN of the Trustee

ACN

Address of the Trustee

Jurisdiction of Trust

In the State of

Name of the Trust

The   Trust

Name of the Appointor

[blank box]

The Appointor has ultimate control (namely, can appoint and discharge the Trustee). Depending on the individual circumstances of the client, the Appointor can be a single person or two persons jointly (eg: husband and wife).

Name of the Principal Beneficiaries

[blank box]

The deed provides that the beneficiaries include such persons as are related to the Principal Beneficiary as follows:

The spouse, children and remote descendants of such children, brothers, sisters, parents, children and remote descendants of such brothers and sisters and spouses of any of the foregoing.

Generally, the Principal Beneficiary would be the husband, the wife or both the husband and wife. The latter is recommended where there are children of previous marriages. Note also that the beneficiaries include companies and trusts associated with all the persons named.

If the trustee is a company:

Name of First Director/Sole Director:

[blank box]

Name of all other Directors:

[blank box]

Residential Address of First/Sole Director:

[blank box]

in the State of New South Wales