

**INSTRUCTION SHEET TO ESTABLISH A HYBRID DISCRETIONARY TRUST**

**Delivery Instructions**

Please email documents to the following address:

Please send completed documents to:

**Payment Instructions (please tick):**

- |  |   |
|--|---|
| <input type="checkbox"/> \$440 by email  | <input type="checkbox"/> <b>Excluding Foreign persons</b> ( <i>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</i> ) |
| <input type="checkbox"/> \$550 by post   | <input type="checkbox"/> <b>Not excluding foreign persons</b>   |
| <input type="checkbox"/> \$45 Munro / \$65 for Non-Munro Revenue NSW stamping ( <i>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</i> ) |   |
| <input type="checkbox"/> Please send me a RapidPay reference number for payment prior to delivery  |   |
| <input type="checkbox"/> Please charge my credit card  |   |

<b>Credit Card</b>	<b>Bankcard</b> <input type="checkbox"/>	<b>Visa</b> <input type="checkbox"/>	<b>Mastercard</b> <input type="checkbox"/>
<i>(We are unable to process American Express or Diners)</i>			
<b>Card No.</b>			
<b>Expiry Date</b>			
<b>Credit Card CCV No.</b>			
<i>(Last 3 digits after card no. on front or reverse of card – we cannot process your payment without this number)</i>			
<b>Name on Card</b>			
<b>Amount</b>	\$		
<b>Cardholder's Signature</b>			
<i>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.</i>			

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Please print clearly.

**Name of the Settlor**

The Settlor can not 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**

**Address of the Trustee**

**Jurisdiction of Trust**

**Name of the Trust**

**Name of the Appointor**

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**

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:**

**Name of all other Directors:**

**Residential Address of First/Sole Director:**

in the State of New South Wales

**Details for the Allotment of Units:**

**Name of Unitholder:**

**Address of Unitholder:**

**No of Units to be issued:**