

DISCRETIONARY TRUST ORDER FORM

Client Name: _____

DATE: _____

CONTACT PERSON: _____

PHONE: _____

Email: _____

FAX: _____

Australian Shelf Companies Pty Ltd act only as agents in the provision of Trust Deeds. Each individual Deed is prepared by the solicitors whose name appears on the cover sheet. Individual or professional firms ordering a Trust Deed should satisfy themselves that the Deed meets their requirements.

EMAIL VERSION ONLY (APPLICANT MUST PROVIDE THE SETTLOR)

Name of Trust _____

APPLICABLE LAW

Unless otherwise indicated below the trust deed will state that the applicable law for the trust is the law of **QUEENSLAND**.

If you require the law of another State to apply instead please indicate. _____

Please contact the relevant OFFICE OF STATE REVENUE regarding the duty payable on the establishment of this deed.

SETTLOR (The Settlor must be a person or company with no other involvement in the Trust. If you tick the box below Australian Shelf Companies Pty Ltd will provide a Settlor and a cheque for the Settlement Sum will be sent with the Trust)

Australian Shelf Companies Pty Ltd as Settlor Settlement Sum \$10:00

Or

Name of Settlor _____

(Full Name or Company name and ACN)

Settlement Sum _____ (Usually between \$10 to \$100)

TRUSTEE (Cannot be the Settlor or any Child of the Settlor) (Full Name or Company name and ACN)

Trustee 1 _____

Trustee 2 _____

If the Trustee is a company please give the full names of the directors

1. _____

2. _____

3. _____

4. _____

Do you want to include a charity as a tertiary beneficiary? Yes No

If yes- please nominate the charity _____

Do you want to exclude foreign persons as beneficiaries? Yes No

APPOINTOR (Remove and appoints the Trustee – Cannot be the Settlor – Joint and/or successor appointors can be appointed)

Name 1 _____

Name 2 _____

If there is more than one appointer, are they: Joint appointers Or a successor appointer

PRIMARY BENEFICIARIES

Full name(s) of the person(s) who are to be named as eligible beneficiaries under the Trust.

