

## 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)

Address \_\_\_\_\_

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 \_\_\_\_\_

Address \_\_\_\_\_

Trustee 2 \_\_\_\_\_

Address \_\_\_\_\_

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 \_\_\_\_\_

Address \_\_\_\_\_

Name 2 \_\_\_\_\_

Address \_\_\_\_\_

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.

\_\_\_\_\_  
\_\_\_\_\_