

DISCRETIONARY TRUST INSTRUCTIONS

1. SETTLOR

Please provide full name, address and occupation:

2. TRUSTEE

Please provide full name, address and occupation or registered company name, ACN and registered office:

3. DIRECTORS OF TRUSTEE

Please provide full name, address of the Directors of the Trustee Company.

1.

2.

4. PRIMARY BENEFICIARIES

Please provide full name, address and occupation (usually only the children):

OR

The children of the marriage of

5. ADDITIONAL BENEFICIARIES

If not already stated please provide full name, address and occupation:

6. GUARDIAN AND APPOINTOR

If not Trustees, please provide full name address and occupation:

and upon his/her/their death

7. SETTLED SUM

8. VESTING DATE (if not 80 years)

9. NAME OF TRUST

10. DATE SETTLED

COST \$200 including GST: PLUS PDF version only :\$10 plus GST disbursements

Bound copy and posted :\$25 plus GST disbursements

OTHER COMMENTS / NOTES

YOUR CONTACT DETAILS

(name, address, number, email)