

Discretionary Trust Establishment

Contact Details:

Advisor Name:

Advisor Company:

Postal Address:

Phone: Email:

Payment Details:

Enclosed is payment for a Discretionary Trust for \$242.00

Direct Deposit* Cheque

Account name: Super Registry Pty Ltd
Account details: Macquarie Bank
BSB: 183-334
Account: 122 641 285

**If you are paying via direct deposit please use the Trust name as the transaction reference*

Discretionary Trust Details:

Name of Trust:

Establishment date: / /
.....

State of Registration:

Registered Address:

Address where the Trustees
will hold their meetings:

Settlor Details:

Name of Settlor:

Address of Settlor:

Settled Sum: \$
.....

Appointor Details:

Appointor 1 Name:
Address:
Successor to the Appointor:
Appointor 2 Name:
Address:
Successor to the Appointor:

Trustee Details (if a Corporate Trustee):

Company Name:
Company ACN: - -
Registered address:
Director Names (4 max):
.....
.....
.....
.....
Company Chairman:

Trustee Details (if individual Trustees):

Trustee Names:
.....
.....
.....
.....
Who will act as Chairman of the Trustees?

Details of Specified Beneficiaries:

Beneficiary 1 Name:
ACN (if applicable): - -
Address:

Beneficiary 2 Name:
ACN (if applicable): - -
Address:

Beneficiary 3 Name:

ACN (if applicable):

.....
- -

Address:

.....
.....

Beneficiary 4 Name:

ACN (if applicable):

.....
- -

Address:

.....
.....

Beneficiary 5 Name:

ACN (if applicable):

.....
- -

Address:

.....
.....

Beneficiary 6 Name:

ACN (if applicable):

.....
- -

Address:

.....
.....

**If you would like to nominate additional Specified Beneficiaries (up to a maximum of 20) please complete their details on a separate sheet of paper and attach it to your order.*

Details of General Beneficiaries:

Beneficiary 1 Name:

ACN (if applicable):

.....
- -

Address:

.....
.....

Beneficiary 2 Name:

ACN (if applicable):

.....
- -

Address:

.....
.....

Beneficiary 3 Name:

ACN (if applicable):

.....
- -

Address:

.....
.....

**If you would like to nominate additional General Beneficiaries (up to a maximum of 5) please complete their details on a separate sheet of paper and attach it to your order.*

Please Fax or Email this completed form to Super Registry:

Fax: (03) 8256 0108

Email: info@superregistry.com.au