

Discretionary Trust

Firm (If any)

Date

Contact Person

Phone

Email

Ref No.

SHELF COMPANY SERVICES AUSTRALIA PTY LTD act as agents in the provision of Trust Deeds. Each Deed is prepared by the Solicitor. Individuals or professional firms ordering a Trust Deed should satisfy themselves that the Deed meets their requirements.

BY COMPLETING THIS ORDER FORM YOU ARE CONFIRMING THAT VERIFICATION OF IDENTITY & CUSTOMER DUE DILIGENCE CHECKS HAVE BEEN PERFORMED.

- ☐ Full Documentation Hard Copy
- ☐ Digital version only

Name of trust

Applicable Law / Options

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 NSW to apply instead please indicate here. For other States contact us for a price.

- ☐ Tick if, It is contemplated that the Trust will own dutiable NSW property & Foreign Persons are to be excluded as beneficiaries?
- ☐ Tick if, you want to include default income beneficiaries?
- ☐ Tick if, You wish to Nominate a Charity as a tertiary Beneficiary

Settlor

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

☐ Shelf Company Services Australia Pty Ltd ACN 608 393 451 to provide Settlor.

Settlement Sum \$10.00

OR

Name of Settlor

(Full name or Company name and A.C.N.)

Settlement sum \$ (usually between \$10 to \$100)

Trustee (cannot be the Settlor or any child of the Settlor)

Name 1

(Full name or Company name and A.C.N.)

Name 2

(Full name or Company name and A.C.N.)

If the trustee is a company please give the full names of the **director & secretaries** (if applicable)

1.

2.

3.

4.

Principal (removes and appoints the Trustee - cannot be the Settlor, Can have joint or successor principals)

Name/s

(Full name or Company name and A.C.N.)

Successor Principal (if applicable)

Name/s

(Full name or Company name and A.C.N.)

Primary Beneficiaries

Full name(s) of the person(s) (e.g. husband and wife) who are to be named as principal beneficiaries under the Trust. (Cannot be Settlor)