



ORDER FORM – DISCRETIONARY TRUST DEED

Firm / Person Placing Order	
Firm Name:	Contact Name:
Delivery Address (no PO boxes):	
Suburb:	State: Postcode:
Phone:	Email:

How Will Payment Be Made
<input type="checkbox"/> Account number:
<input type="checkbox"/> Direct Deposit: BSB: 062 210 Acct. 1036 0658 (Please use desired Trust Name as reference)
<input type="checkbox"/> Cheque (Must be cleared before processing and made payable to Patricia Holdings)
<input type="checkbox"/> Credit Card Number Expiry Date
Card Holder Name
Type of Card: MasterCard <input type="checkbox"/> Visa <input type="checkbox"/> Amex <input type="checkbox"/> (NB: Amex will incur 1.93% incl. GST fee)
Signature:

Trust - Delivery Type
<input type="checkbox"/> <input type="checkbox"/> \$324.50 A quality bound Trust Register delivered to you via courier. Please choose either <input type="checkbox"/> Grey or <input type="checkbox"/> White
<input type="checkbox"/> <input type="checkbox"/> \$280.50 A PDF version of the Trust Register delivered to you via email.
Package Deals (leave blank if not in a package) NB: Our stamping fee does not include cost of OSR (NSW) or SRO (VIC) Stamp Duty OSR and SOR Stamping Fees subject to change without notice
<input type="checkbox"/> Company + Deed Couriered \$1089.50
<input type="checkbox"/> Company + Deed Emailed \$924.50
<input type="checkbox"/> Company + Deed + our stamping fee* Couriered \$1166.50
<input type="checkbox"/> Company + Deed + our stamping fee* Emailed \$1001.50
*If selecting Deed Stamping in addition to your Trust or Package, please select
<input type="checkbox"/> Trust /Package fee + OSR fee for Original \$500.00
<input type="checkbox"/> Trust/ Package fee + SRO fee \$200 (Fixed Trust price for VIC)
<input type="checkbox"/> Plus 1 Duplicate \$510.00
<input type="checkbox"/> Trust/Package fee + Your own cheque for the OSR or SRO Fee
<input type="checkbox"/> Or 2 Duplicates \$520.00
<input type="checkbox"/> Or 3 Duplicates \$530.00
Please provide your bank account details below, in the event that we need to refund stamp duty

payments. **

Bank: Account Name:

BSB: Account Number:

Trust Details

Desired Name of Trust

State of Jurisdiction

Is a charity to be a Beneficiary of this Trust? ☐ Yes ☐ No

First Trustee
Name:
Address:
.....
A.C.N. (if company):

Second Trustee
Name:
Address:
.....
A.C.N. (if company):

Settlor (non-related*)	Name:	Settled Sum
	Address:

Specific Exclusions
.....
(*must be the settlor if related)

Appointor Name:

Guardian
(Optional) Name:

Specified Beneficiaries
(Include A.C.N. if company)
Name:
Name:
Name:
Name:
Name:

Additional Beneficiaries
(Include A.C.N. if company)
Name:
Name:
Name:

Is there to be any limitation on the amount or percentage of income and/or capital that can be paid to any one beneficiary?
☐ Yes (If yes, state the amount or percentage of income or capital limitation).....
☐ No



THINGS TO KNOW

1. **NO LEGAL, FINANCIAL OR TAX ADVICE**

We do not provide legal, financial or taxation advice and therefore take no responsibility for these matters. You should consult your lawyer, financial advisor or accountant before placing an order with us.

2. **NAME ON TAX INVOICE (for Clients with Accounts)**

Please note that you are our client and tax invoices are in your name and it is you we extend credit to, not your client. We cannot and will not alter the tax invoice from you to your client *after* your order has been processed. Should you want the tax invoice in the name of your client ***please advise us beforehand*** so it is not on your account. *We shall require cleared funds in payment prior to processing your order as we do not extend credit to clients of our clients.* **The name on the tax invoice determines the debtor.**

3. **TERMS OF TRADE (for Clients with Accounts)**

We extend thirty days terms of trade to practising solicitors, financial planners and accountants but not to their clients. We require cleared funds from private clients before we process the order. See 2 above re name on Tax Invoice. Where accounts are paid after the time of order using credit card, we charge an admin fee of 0.87% (incl. GST) on Visa and MasterCard and 1.93% (incl. GST) on Amex.

Whilst most of our clients observe the 30 days terms of trade we extend, please be aware it is company policy to suspend further credit at 45 days.

You will be liable for any debt recovery expenses relating to the payment of your account.

4. **TERMS OF TRADE (for Private Clients)**

We require cleared funds from private clients before we process the order. American Express (subject to surcharge of 1.93% incl. GST), MasterCard and Visa (not subject to surcharges) accepted. Non-bank cheques are accepted but need to be cleared before your order is processed which may take four business days.

5. **REFUNDS**

Products and services supplied by us are created to meet the specific requirements of each purchaser and/or client. We provide products and services that cannot be re-sold to another purchaser or client. As a result of this, we do not provide refunds for products or services supplied in good faith according to the request of the purchaser or client.

6. **RETURNS**

If the product or service is returned/referred back to us due to an error on the part of the purchaser or client, and we have complied with the original instructions and directions of the purchaser/client, we reserve the right to levy an additional charge that fairly reflects the time and expertise required to amend the error. We are not responsible for any error or loss due to a purchaser/client's mistake or misunderstanding of the Law.

7. **STAMP DUTY REFUNDS****

If you pay to have your trust deed stamped with the State Revenue Office (VIC) or the Office of State Revenue (NSW), and if you do not return the executed deed (with a completed statutory declaration) to us for stamping within 9 months from the date of invoice, we may refund the SRO/OSR fee to your nominated account. Please note that we will not refund our stamping service fee in these circumstances.