

CHARITABLE TRUST SET UP CHECKLIST

Outlined below is a checklist of the information needed to complete a Charitable Trust application.

TRUST DETAILS

- Desired name of Trust
- State of Jurisdiction
- Can 'foreign persons' benefit from the Trust?
- Is the Trust:
 - A Private Charitable Trust; or
 - A Public Charitable Trust suitable for DGR Status (requires min. 5 Individual Trustees or a Corporate Trustee with min. 5 Directors)
- Reason for establishment of the Trust

TRUSTEE DETAILS

- Full name
- Residential address
- A.C.N. if company
- Directors Names and residential addresses if company

SETTLOR DETAILS

- Full name
- Address
- Settled Sum

APPOINTOR DETAILS

- Full name