

CONFIRMATORY FAMILY (DISCRETIONARY) TRUST SET UP CHECKLIST

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

TRUST DETAILS

- Original name of Trust
- Original State of Jurisdiction
- Original Execution Date

ORIGINAL TRUSTEE DETAILS

- Full name
- Address
- A.C.N. if company
- Second Trustee details (if any)

ORIGINAL SETTLOR DETAILS

- Full name
- Address
- Settled Sum

ORIGINAL APPOINTOR DETAILS (if any)

- Full Name

ORIGINAL BENEFICIARY DETAILS

- Nominated Beneficiary Name(s)
- A.C.N. if above is company
- Additional Beneficiaries (Optional)
- A.C.N. if above is company
- Specific Exclusions (Optional)

If you have any questions about this list, please contact our friendly staff on 02 9953 2399.