

FAMILY (DISCRETIONARY) TRUST SET UP CHECKLIST

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

TRUST DETAILS

- Desired name of Trust
- State of Jurisdiction
- Can 'foreign persons' benefit from the Trust?

TRUSTEE DETAILS

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

SETTLOR DETAILS

- Full name
- Address
- Settled Sum

APPOINTOR DETAILS (Optional)

- Full Name

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.