

## PAPSON LEGAL – NEW DISCRETIONARY (FAMILY) TRUST

### ORDER INFORMATION

Name of Firm: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Tick this box if you would like the documentation in hard copy (we will charge a small postage disbursement on top of our usual fee)

Tick this box if you would like us to invoice the fund's trustee

### TRUST INFORMATION

Name of Trust: \_\_\_\_\_

### TRUSTEE INFORMATION

Please complete the trustee information below for **either** a corporate trustee or individual trustees.

#### **CORPORATE TRUSTEE**

Have you ordered a company from Papson Legal to be trustee? If **yes**, then check this box  and provide us with the details on the company order form.

If **not**, then please complete the details below.

Company Name: \_\_\_\_\_

Company ACN: \_\_\_\_\_

Registered Address of Company: \_\_\_\_\_

Full Names of Directors:

Director 1		Director 2	
Director 3		Director 4	

#### **OR INDIVIDUAL TRUSTEES**

Full Name and Home Address of Trustee 1:

\_\_\_\_\_

Full Name and Home Address of Trustee 2:

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Full Name and Home Address of Trustee 3:

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Full Name and Home Address of Trustee 4:

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### **APPOINTOR INFORMATION**

Please supply the appointor information below. The role of appointor is to hire and fire the trustee – and therefore the appointor will ultimately control the trust.

Appointor 1 –list full name and address below.

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Appointor 2 –list full name and address below.

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### **BENEFICIARY INFORMATION**

Please list the names and address of the primary beneficiaries below. Note – the trust's deed will extend total beneficiaries to include descendants and family of the beneficiaries named below, as well as related entities.

Beneficiary 1 –list name and address below.

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Beneficiary 2 –list name and address below.

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Beneficiary 3 –list name and address below.

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Beneficiary 4 –list name and address below.

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## SETTLOR DETAILS

The settlor is a person who establishes the trust, and will need to sign the trust deed. Once they have signed the deed, they will have no involvement with the running of the trust. The settlor should ideally be a family friend of the beneficiaries.

Full name and Address of Settlor:

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Settled Sum (\$10 unless stated otherwise): \_\_\_\_\_

## ADDITIONAL INSTRUCTIONS

Are there any additional instructions with this order? \_\_\_\_\_

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