

DISCRETIONARY TRUST

Please complete all details in block letters.

Delivery of documents (electronic/hardcopy) Tick here <input type="checkbox"/> if you wish to receive documents in hardcopy for an additional \$50 plus delivery costs.
--

Name of Trust	
Settled Sum (if other than \$10)	

PERSON ORDERING

Firm Ordering (if applicable)					
Person ordering					
Tick here <input type="checkbox"/> if we are to invoice the trustee (otherwise, our invoice will be made out to the person ordering).					
Street address					
Postal address, if different					
Phone		Fax		Email	

COMPANY OR INDIVIDUAL TRUSTEES (note: a corporate trustee is preferred)

COMPANY TRUSTEE	If company ordered from DBA, tick here <input type="checkbox"/> (a company form should also be completed).		
Company Name			
ACN	- -		
Registered Office			
Full names of all directors:			
T1		T2	
T3		T4	

OR:

INDIVIDUAL TRUSTEES		
T1	Full Name	
	Street Address	
T2	Full Name	
	Street Address	
T3	Full Name	
	Street Address	
T4	Full Name	
	Street Address	

MAIN BENEFICIARIES

The main beneficiaries are typically the main people who will benefit under the trust (eg, husband and wife).

MB 1	Full Name	T1? <input type="checkbox"/>	
MB 2	Full Name	T2? <input type="checkbox"/>	

APPOINTOR

Please enter the details of each appointor. The appointor holds the ultimate control over the trust (eg, appointing and removing the trustee).

A1	Full Name	T1? <input type="checkbox"/>	
A2	Full Name	T2? <input type="checkbox"/>	

SETTLOR

The settlor is the person who creates the trust by placing the first sum (eg, \$10) on trust and has no further role or benefit in the trust. The settlor should not be related to the beneficiaries. The settlor should be a person genuinely interested in the well-being of the beneficiaries and who desires to settle a trust in favour of the beneficiaries. Ideally, the settlor should not be an accountant or financial planner who is remunerated by the beneficiaries. The settlor should never be reimbursed or refunded the settled sum.

S1	Full Name	
	Residential Address	

Free newsletter

Tick here to receive free newsletters, SMSF technical updates and seminar news.

SPECIAL INSTRUCTIONS

Note that DBA is not licensed to provide financial product advice under the *Corporations Act 2001* (Cth).