

## UNIT TRUST

Please complete all details in block letters.

### Delivery of documents (electronic/hardcopy)

Tick here  if you wish to receive the documents in **hardcopy** for an additional \$50 plus delivery costs.

Tick here  if you do not require a ring binder (and are receiving hardcopy documents).

<b>Name of Trust</b>	
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## PERSON ORDERING

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

## TRUSTEE

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

DBA strongly recommends that a company should act as trustee. However, if you wish to appoint individual trustees, please provide the full names and street address of each person in the special instructions over the page.

**Please see overleaf for further fields to be completed.**

**UNITHOLDERS**

<b>Unitholder 1</b> - Full name:  T1? <input type="checkbox"/>	ACN (if company)	Premium (if any)
Street address	Number of units	Extent paid Fully Paid? <input type="checkbox"/>
	Consideration  \$1 per Unit? <input type="checkbox"/>	
If unit holder is holding on behalf of a trust or SMSF , provide the full name of the trust or SMSF:		
<b>Unitholder 2</b> - Full name:  T2? <input type="checkbox"/>	ACN (if company)	Premium (if any)
Street address	Number of units	Extent paid Fully Paid? <input type="checkbox"/>
	Consideration  \$1 per Unit? <input type="checkbox"/>	
If unit holder is holding on behalf of a trust or SMSF , provide the full name of the trust or SMSF:		
<b>Unitholder 3</b> - Full name:  T3? <input type="checkbox"/>	ACN (if company)	Premium (if any)
Street address	Number of units	Extent paid Fully Paid? <input type="checkbox"/>
	Consideration  \$1 per Unit? <input type="checkbox"/>	
If unit holder is holding on behalf of a trust or SMSF , provide the full name of the trust or SMSF:		
<b>Unitholder 4</b> - Full name:  T4? <input type="checkbox"/>	ACN (if company)	Premium (if any)
Street address	Number of units	Extent paid Fully Paid? <input type="checkbox"/>
	Consideration  \$1 per Unit? <input type="checkbox"/>	
If unit holder is holding on behalf of a trust or SMSF , provide the full name of the trust or SMSF:		

**SMSF & Unit Trust Kit (\$440)**

Tick here  if you would like to purchase a SMSF & Unit Trust Kit. It provides valuable guidance and practical tools for SMSFs that invest in unit trusts. It covers SMSFs investing in non-g geared unit trusts and converting a pre-1999 geared unit trust into a non-g geared unit trust.

**Free newsletter**

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

**SPECIAL INSTRUCTIONS**


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As a law firm we are not licensed to provide financial product advice under the *Corporations Act 2001* (Cth).