

## SPECIAL TRUST

Including Special Disability Trust, Estate Proceeds Trust, Child Maintenance Trust or Superannuation Proceeds Trust.

**\*Please complete all details in block letters.**

**NAME OF TRUST** \_\_\_\_\_  
**SETTLED SUM** (if other than \$10) \_\_\_\_\_

### SECTION A: PERSON ORDERING TRUST

**PERSON ORDERING TRUST** \_\_\_\_\_ **Signature** \_\_\_\_\_

(documents and invoice will be directed to this person, unless otherwise stated)

Company name (if applicable) \_\_\_\_\_  
 Street address \_\_\_\_\_  
 Postal address, if different \_\_\_\_\_  
 Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

### SECTION B: TYPE OF TRUST

- If you are ordering:
- a Special Disability Trust ('SDT') .....tick here
  - a Estate Proceeds Trust ('EPT') .....tick here
  - a Child Maintenance Trust ('CMT') .....tick here  and complete additional section G
  - a Superannuation Proceeds Trust ('SPT') .....tick here

### SECTION C TRUSTEE DETAILS (Note: Corporate trustee is preferred)

If the Trustee is a Company then complete section C(I) only. If the Trustees are individuals then complete section C(II) only.

#### SECTION C(I): TRUSTEE INFORMATION WHERE TRUSTEE IS A COMPANY

Name \_\_\_\_\_ ACN \_\_\_\_\_ - -  
 Date of Incorporation \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
 Address of Registered Office \_\_\_\_\_  
 Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

Full names of all directors of trustee company

<b>T1</b>		<b>T2</b>	
<b>T3</b>		<b>T4</b>	

#### SECTION C(II) TRUSTEE INFORMATION WHERE TRUSTEE IS AN INDIVIDUAL/GROUP OF INDIVIDUALS

If **individual** trustees, their full names and addresses:

<b>T 1</b>	Full Name	
	Address	
<b>T 2</b>	Full Name	
	Address	
<b>T 3</b>	Full Name	
	Address	
<b>T 4</b>	Full Name	
	Address	

**SECTION D: DETAILS OF EACH MAIN BENEFICIARY**

<b>MB 1</b>	Full Name	T1? <input type="checkbox"/>	
	Address		

<b>MB 2</b>	Full Name	T2? <input type="checkbox"/>	Relationship to Main Beneficiary (MB1) <b>Spouse?</b> <input type="checkbox"/>
	Address		

<b>MB 3</b>	Full Name	T3? <input type="checkbox"/>	Relationship to Main Beneficiary (MB1) <b>Spouse?</b> <input type="checkbox"/>
	Address		

<b>MB 4</b>	Full Name	T4? <input type="checkbox"/>	Relationship to Main Beneficiary (MB1) <b>Spouse?</b> <input type="checkbox"/>
	Address		

For an SDT or CMT, the main beneficiaries are the children for whom you wish to provide maintenance.  
For an EPT or SPT, the person(s) establishing the trust (eg, husband and wife) are typically the main beneficiaries.

**SECTION E: DETAILS OF EACH APPOINTOR**

<b>A 1</b>	Full Name	T1? <input type="checkbox"/>	
	Address		

<b>A 2</b>	Full Name	T2? <input type="checkbox"/>	Relationship to Appointor (A1) <b>Spouse?</b> <input type="checkbox"/>
	Address		

An Appointor ultimately controls the Trust and, among other things, has the power to appoint or remove the trustee/s.

**SECTION F: DETAILS OF THE SETTLOR – Settlor should not be related to, or remunerated by, the main beneficiaries.**

<b>S 1</b>	Full Name	
	Address	

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.

**SECTION G: SPECIAL INSTRUCTIONS FOR A CMT ONLY**

Complete this section for CMTs only. For all other trusts, proceed to Section H if you have any further instructions.

Full name of the first spouse	
Full address of the first spouse	
Full name of the second spouse	
Full address of the second spouse	
Describe why this trust is being set up, eg, Family Court Order, Child Support Order, Maintenance Agreement, etc	
Date of Order/Agreement	
Assets from the relationship to go on this trust	
Value of the assets to go on this trust	

