

Hardcopy order form only – please complete and return to dba@dbalawyers.com.au

CHANGE OF TRUSTEE OF A DISCRETIONARY OR UNIT TRUST		<i>Please complete all details in block letters</i>
Firm ordering (if applicable):		
Person ordering:		
Street address:		
Postal address (if different):		
Phone:	Email:	
Tick here <input type="checkbox"/> if we are to invoice the trustee (otherwise, our invoice will be made out to the person ordering)		
Documents will be delivered by email as PDF files	Tick here <input type="checkbox"/> for hardcopy delivery (fee applies) Tick here <input type="checkbox"/> if you want a ring binder	

NAME OF TRUST
Name of trust:
Date of deed establishing the trust:
<i>Please provide a complete PDF copy of the trust deed. This is required for us to carry out this order.</i>
Has there been any variation to the trust deed? Yes <input type="checkbox"/> No <input type="checkbox"/> (If yes, please provide any relevant deeds)
<i>If the order is for a unit trust, please provide an up to date unitholder register showing the name and address of each unitholder.</i>

CURRENT TRUSTEE			
COMPANY TRUSTEE			
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:
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NEW TRUSTEE	
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COMPANY TRUSTEE	
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Company name:

ACN:

Registered office:

Full names of all directors:

T1		T2	
T3		T4	

OR, INDIVIDUAL TRUSTEES	
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T1	Full name:
	Street address:

T2	Full name:
	Street address:

T3	Full name:
	Street address:

T4	Full name:
	Street address:

APPOINTOR

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

COMPANY APPOPINTOR	
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Company name:

ACN:

Registered office:

Full names of all directors:

T1		T2	
T3		T4	

OR, INDIVIDUAL APPOINTOR	
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T1	Full name:
	Street address:

T2	Full name:
	Street address:

T3	Full name:
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	Street address:
T4	Full name:
	Street address:

FEES	
<p>Our standard fees for a change of trustee of a discretionary trust are \$770 inclusive of GST.</p> <p>If after reviewing the trust deed we determine there are issues relating to the proposed change of trustee, we will contact you to discuss and fees may increase. If the current trust deed is a DBA trust deed, there is unlikely to be any issues.</p> <p>Our fees are for documents only without advice. There may be transaction fees and costs relating to the transfer of assets. If dutiable property is held in the trust, such as real estate, you will need to engage a conveyancing/property lawyer in the relevant jurisdiction. You should seek advice as to the possibility of any duty concession prior to any change.</p>	

SPECIAL INSTRUCTIONS	
<p>Note that DBA is not licensed to provide financial product advice under the <i>Corporations Act 2001</i> (Cth).</p>	