

### **Additional \$50 fee applies unless ordered online**

From 1 August 2021 unless documents are ordered online at <https://online.dbalawyers.com.au/login> an additional \$50 fee applies per suite of documents.

For a tutorial video see <https://www.dbalawyers.com.au/online-ordering>

When ordering online you receive a quicker turn around and many other benefits, with no compromise on quality.

Order online to receive priority service at <https://online.dbalawyers.com.au/login>

<b>DISCRETIONARY TRUST</b>		<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	

<b>NAME OF TRUST</b>
Name of trust:
Settled sum (if other than \$10):

<b>COMPANY TRUSTEE</b>	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	

<b>OR, INDIVIDUAL TRUSTEES</b>	
T1	Full name:
	Street address:
T2	Full name:
	Street address:
T3	Full name:
	Street address:
T4	Full name:
	Street address:

**MAIN BENEFICIARIES** | If 'foreign persons' are to be excluded for duty and/or land tax purposes, please note your requirements in the special instructions below and see note below\*.

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"/>
MB 3	Full name:	T3? <input type="checkbox"/>
MB 4	Full name:	T4? <input type="checkbox"/>
MB 5	Full name:	T5? <input type="checkbox"/>
MB 6	Full name:	T6? <input type="checkbox"/>
MB 7	Full name:	T7? <input type="checkbox"/>
MB 8	Full name:	T8? <input type="checkbox"/>

**\*Additional State and Territory taxes — foreign beneficiaries**

Additional duty and land tax may be payable by a trustee in respect of real property and certain other dutiable property in most States and Territories in Australia. This primarily applies to residential property.

To minimise this risk, DBA Lawyers' trust deed can be specifically drafted to exclude 'foreign beneficiaries'.

If you want to distribute to foreign beneficiaries, we recommend that you first obtain advice before ordering.

We can then prepare a deed tailored to your specifications for an additional fee. Naturally, please let us know if you require any advice as it is vital that the right deed be obtained from the commencement of a trust.

Please note that once a deed is executed, it is difficult and costly to vary.

**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 cannot benefit under the trust and should not be related to the beneficiaries.

S1	Full name:
	Residential address:

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.

**SPECIAL INSTRUCTIONS**


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