

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

CHANGE OF TRUSTEE OF A UNIT TRUST		Please complete all details in block letters
Firm ordering (if applicable):		
Person ordering:		
Street address:		
Postal address (if different):		
Phone:	Email:	
Tick here ☐ if we are to invoice the fund's trustee (otherwise, our invoice will be made out to the person ordering)		
Documents will be delivered by email as PDF files	Tick here ☐ for hardcopy delivery (fee applies) Tick here ☐ 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 ☐ No ☐ (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:

UNITHOLDERS		
Unitholder 1 - Full name:		T1?
		ACN (if company):
Street address:		
If unit holder is holding on behalf of a trust or SMSF, provide the full name of the trust or SMSF:		
Unitholder 2 - Full name:		T2?
		ACN (if company):
Street address:		
If unit holder is holding on behalf of a trust or SMSF, provide the full name of the trust or SMSF:		
Unitholder 3 - Full name:		T3?
		ACN (if company):
Street address:		
If unit holder is holding on behalf of a trust or SMSF, provide the full name of the trust or SMSF:		
Unitholder 4 - Full name:		T4?
		ACN (if company):
Street address:		
If unit holder is holding on behalf of a trust or SMSF, provide the full name of the trust or SMSF:		

NEW 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:	

FEES
Our standard fees for a change of trustee of a unit trust are \$770 inclusive of GST. 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. 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.

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