

## Trust Establishment

### Trust Details

Proposed Name

Second Choice

Type of Trust ☐ Discretionary ☐ Unit ☐ Other - please specify

Trustee ☐ Company ☐ Individual

*If company please fill out company establishment, if individual fill out below*

### Trustee Individual

*If company trustee see company establishment document*

Trustee First Name

Middle Name

Surname:

Date of Birth

Tax File Number

Address

Town of Birth

### Beneficiary(s)

Beneficiary(s) Name

1.

2.

3.

4.

5.

6.

## Trust Establishment

### Registrations

Tax File Number	<input type="checkbox"/> Yes	<input type="checkbox"/> No
ABN	<input type="checkbox"/> Yes	<input type="checkbox"/> No
PAYG	<input type="checkbox"/> Yes	<input type="checkbox"/> No
GST	<input type="checkbox"/> Yes	<input type="checkbox"/> No
GST Method	<input type="checkbox"/> Cash	<input type="checkbox"/> Accrual

### Settlor's Details

*The settlor is the person responsible for setting up the trust and naming the beneficiaries, the trustee and, if there is one, the appointor. For tax reasons, the settlor should not be a beneficiary under the trust.*

Settlor First Name

Middle Name:

Surname:

Date of Birth

Address

Settlors Sum *(suggested \$10)*

### Appointor *(optional)*

*Many, but not all trusts have an appointor. They are the guardians or controllers of the trust and have the power to remove or appoint trustees*

Appointor First Name

Middle Name:

Surname:

Date of Birth

Address

# Trust Establishment

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**Chair** (Yes/No)

*Power to give casting vote to break deadlocks*

Chairperson First Name

Middle Name

Surname

Date of Birth

Address