

DISCRETIONARY TRUST INSTRUCTION SHEET

Trust		
1	Name of Trust (What would you like to call your trust? eg. Bartier Perry family trust).	
2	Name of Settlor The settlor is the person who provides the initial trust property – usually a nominal sum of cash. The settlor is also required to sign the trust deed but has no ongoing role in the trust. The settlor cannot be a trustee or beneficiary of the trust.	First name middle name surname
3	Address of Settlor	Street number, Street name, Suburb, State, Postcode
4	Initial Sum (paid by Settlor to settle the Trust) This is usually a sum of cash e.g. \$10	
Trustee		
5	Trustee is: a) A company (please fill out a) below) b) An Individual (please fill out b) below) c) Two or more individuals (please fill out c) below) The trustee is responsible for the management of trust. The trustee can be an individual/individuals or a company.	
	<i>a) A company</i>	
	Name of Trustee	
	ACN of Trustee	
	Address of Trustee (registered office of company)	Street number, Street name, Suburb, State, Postcode
	Is the Trustee a sole director company? (if yes, fill in name of Sole Director)	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Name of Sole Director	First name middle name surname
	<i>b) An Individual</i>	
	Name of Trustee	First name middle name surname
	Address of Trustee	Street number, Street name, Suburb, State, Postcode

	<i>c) Two or more individuals</i>	
	Name of Individual Trustee 1	First name Middle name Family name
	Address of Individual Trustee 1	Street number, Street name, Suburb, State, Postcode
	Name of Individual Trustee 2	First name Middle name Family name
	Address of Individual Trustee 2	Street number, Street name, Suburb, State, Postcode
	Name of Individual Trustee 3	First name Middle name Family name
	Address of Individual Trustee 3	Street number, Street name, Suburb, State, Postcode
	Name of Individual Trustee 4	First name Middle name Family name
	Address of Individual Trustee 4	Street number, Street name, Suburb, State, Postcode
	Name of Person giving Statutory Declaration This person must be the individual trustee (or if more than one individual, then any of them) or a director of the company trustee). Address of Person giving Statutory Declaration	First name middle name surname Street number, Street name, Suburb, State, Postcode
General Details		
6	Name of Appointor The Appointor is considered to be the ultimate controller of the trust because they have the power to appoint and remove the trustee. You can nominate 1 or more persons to be the Appointor	
7	Name of Principal The office of Principal is used to define the class of beneficiaries (i.e. the beneficiaries are the Principal, the children of the Principal, the spouse of the Principal etc). The Principal is also the default capital beneficiary of the trust. You can nominate 1 or more persons to be the Principal	

8	Postal address for Documents	Street number, Street name, Suburb, State, Postcode
9	Exclude 'Foreign Persons' for NSW land tax and duty surcharge purposes Excluding foreign persons may be relevant if the trust will purchase or hold residential property or interests in residential property. The exclusion is irrevocable (i.e. cannot be changed). Read our article on this here.	<input type="checkbox"/> Yes <input type="checkbox"/> No
10	Instructions Provided By: Contact number: Contact email:	
11	Do you prefer to receive the documents via post, email or both?	<input type="checkbox"/> Post <input type="checkbox"/> Email <input type="checkbox"/> Both
	Postal address for Documents	Street number, Street name, Suburb, State, Postcode
	Email address for documents	
	Your contact number	

Bartier Perry fees are \$770 GST inclusive.

Payment

* Credit Card Number

* CCV (digits on back of card)

* Expiry date

Choose...



Choose...



* Name on card

If you have any question, please email privatedocs@bartier.com.au or contact us on +61 2 8281 7800.