

DISCRETIONARY TRUST ESTABLISHMENT

Name of the Trust:		
Date of Establishment:	State Established:	
Settled Sum:	Contact Person:	
Contact Phone:	Contact Mobile:	
SETTLOR – Cannot be	e a party to the trust	
Name: Surname		
Given Names		
Address:		
TRUSTEE		
INDIVIDUAL		
Individual Name:		
Title:	Date of Birth:	
Individual Address:		
COMPANY		
Company Name:	A.C.N.	
Company Address:		
Directors:		
APPOINTOR		
Name: Surname		
Given Name		
Address:		
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BENEFICIARIES

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Name: Surname				
Given Name	s			
Title:		Date of Birth:		
Address:		-	· ·	
Relationship to	☐ Self	☐ Spouse		Child
appointor	☐ Parent	☐ Legal Rep		Other
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Name: Surname				
Given Name	S			
Title:		Date of Birth		
Address:				
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Relationship to	☐ Self	☐ Spouse		Child
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Name: Surname				
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Relationship to	☐ Self	☐ Spouse		Child
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Name: Surname				
Given Name	s			
Title:		Date of Birth		
Address:		Date of Birth		
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Relationship to	☐ Self	☐ Spouse		Child
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TAXATION				
Apply for TFN:	TFN:			Yes / No
Apply for ABN:	ABN:			Yes / No
Register for GST:				Yes / No