



The Incorporation People

A division of Corporate Representatives
Pty Limited ABN 85 000 540 741

Suite 212, 20 Dale Street
Brookvale NSW 2100

Ph: 02 9939 2585
STD: 1800 451 804
Fax: 02 9939 2612

www.corpreps.com.au
jandrews@corpreps.com.au

Establishment of a Discretionary Trust

Thank you for your enquiry concerning the establishment of a Discretionary Trust.

We are able to establish a Discretionary Trust to suit your requirements for a fee of **\$253** Emailed as a PDF or **\$297** with Presentation folder (incl. GST).

The usual provisions are set out in our standard Discretionary Trust Deed which will be completed by us following receipt from you of the particulars as set out in our enclosed Discretionary Trust Order Form.

Eligible Beneficiaries

The "eligible beneficiaries" for any specific discretionary trust are determined at the discretion of the parties to the trust and the definition should be drafted to include all persons or entities intended to be included. For your guidance we attach a copy of the standard clause which is included in our standard trust deed. You may accept the clause as drafted or amend the clause to meet your specific requirements and return the amended clause with the attached completed order form.

Nominator/s

Consideration should also be given as to who is to be the person or persons who will nominate from the list of "eligible beneficiaries" the "nominated beneficiaries" for any particular period and whose consent will be required prior to certain actions being taken by the trustee.

A person may be appointed a sole nominator or persons may be appointed as primary and secondary nominators or joint nominators. Please specify your requirements on the attached order form.

Settlor

Please also consider whether you wish to arrange either an individual or a corporate settlor. The settlor should not be the trustee or an eligible beneficiary under the trust deed.

We can if you prefer arrange our settlement company to act as settlor for the purpose of confidentiality. A fee of **\$66** (incl. GST) would be payable in respect of this additional service.

**Please telephone on (02) 9939 2585
if you wish to discuss any aspect of the establishment of the Trust.**



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DISCRETIONARY TRUST ORDER FORM

MODEL Electronic Presentation folder

NAME OF TRUST: _____

Proper Law of the Trust (e.g. NSW, Vic. etc.) _____

Amount Settled:

(Enter \$10 if our settlement company is to be settlor) _____

SETTLOR

Corp Reps supplying the Settlor (Settlement Fee \$66 – incl. GST)

Other Full Name: _____ A.C.N. _____
(if applicable)

Address: _____ P/code: _____

TRUSTEE/s

1. Full Name: _____ A.C.N. _____
(if applicable)

Address: _____ P/code: _____

2. Full Name: _____ A.C.N. _____
(if applicable)

Address: _____ P/code: _____

NOMINATOR/s

Name of 1st Nominator: _____ (Sole/Primary/Joint)

Name of 2nd Nominator _____ (Secondary/Joint)

ELIGIBLE BENEFICIARIES* (see next page)

(Please indicate) _____ Please include the standard eligible beneficiaries clause.

_____ Please include the amended eligible beneficiaries clause attached.

BENEFICIARIES (See letter) (Please delete as applicable)

Name of 1st Beneficiary: _____

Name of 2nd Beneficiary: _____

OR

2nd Beneficiary: "Any spouse of 1st Beneficiary"

***"the Eligible Beneficiaries" means:**

CATEGORY A - (1st Beneficiary)

CATEGORY B - (2nd Beneficiary)

CATEGORY C - Any child or children of (1st Beneficiary) or (2nd Beneficiary) whether born before or after the date of this document.

CATEGORY D - Any grandchild or grandchildren of (1st Beneficiary) or (2nd Beneficiary) whether born before or after the date of this document.

CATEGORY E - Any parent of (1st Beneficiary) or (2nd Beneficiary).

CATEGORY F - Any brother or sister of (1st Beneficiary) or (2nd Beneficiary).

CATEGORY G - Any children of any of the persons referred to in category F.

CATEGORY H - Any corporation whether formed before or after the date of this document (other than the Settlor, the Trustee or a former trustee hereof) in which any of the eligible beneficiaries referred to in categories A to H inclusive holds for the time being any shares.

CATEGORY I - Any trust whether formed before or after the date of this document in which any of the eligible beneficiaries referred to in categories A to H inclusive are beneficiaries whether absolutely, contingently or prospectively but so that no trust may be included if to do so would infringe the rule against perpetuities.

CATEGORY J - Any additional persons, corporations or trusts (other than the Settlor, the Trustee or a former trustee hereof) whether born incorporated or formed before or after the date of this document designated in writing by (the nominator/s).

ORDERED BY	PAYMENT DETAILS
Company name	<input type="checkbox"/> Bankcard <input type="checkbox"/> Mastercard <input type="checkbox"/> Visa Number
Contact name	Expiry date Name
Address	<input type="checkbox"/> Direct deposit <i>(Account details below. Please fax confirmation)</i> CorpReps BSB 062287 A/c No. 10282947 Commonwealth Bank, Brookvale, NSW
Phone/Fax	<input type="checkbox"/> Bank cheque <input type="checkbox"/> Cash
DELIVERY DETAILS	
Personal collection <input type="checkbox"/> Courier <input type="checkbox"/>	Please note: <i>The person placing the order is responsible for payment of the account</i>