



Discretionary Trust Order Form

Fund Name

Proper Law of the Trust

Model

- Electronic
 Presentation Folder

Amount Settled

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

Settlor

- Corp Reps supplying the Settlor (Settlement fee \$77 - incl. GST)
 Other

Full Name

ACN

Street

Suburb

State

Postcode

Trustee - if trustee is a company

Company Name

ACN

Street

Suburb

State

Postcode

Individual Trustee 1

Given Name/s

Surname

Street

Suburb

State

Postcode

Individual Trustee 2

Given Name/s

Surname

Street

Suburb

State

Postcode

Nominator/s

Name of 1st Nominator

Name of 2nd Nominator

- Sole
 Primary/Secondary
 Joint

Beneficiaries

Name of 1st Beneficiary

Name of 2nd Beneficiary

Eligible Beneficiaries

- Please include the standard eligible beneficiaries clause (***including Foreign Persons exclusion clause***)
- Please include the eligible beneficiaries clauses as marked below

"the Eligible Beneficiaries" means:

- Category A - (1st Beneficiary) and (2nd Beneficiary)
- Category B - Any child or children of (1st Beneficiary) or (2nd Beneficiary) whether born before or after the date of this document.
- Category C - Any grandchild or grandchildren of (1st Beneficiary) or (2nd Beneficiary) whether born before or after the date of this document.
- Category D - Any parent of (1st Beneficiary) or (2nd Beneficiary).
- Category E - Any brother or sister of (1st Beneficiary) or (2nd Beneficiary).
- Category F - Any children of any of the persons referred to in category E.
- Category G - A Spouse of any of the forgoing persons referred to in categories A to F inclusive.
- 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 G 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 G 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).
- Notwithstanding the above Foreign Persons are excluded as Eligible Beneficiaries and notwithstanding any other provision relating to any variation to this Trust this prohibition cannot be changed or varied.***

Ordered By

Company Name

Contact Name

Street

Suburb

State

Postcode

Phone

Email

[Send by Email](#)

Please Note The email form will send the data on the form to Corp Reps.
If you wish to keep a copy of the Order Form, then Print or Save the Order Form.

Payment Details

Mastercard Visa

Card No.

Expires (Month/Year)

Direct Deposit

Account details below

Corp Reps BSB 062287

A/c No. 10282947

CBA Brookvale, NSW

Approved Client