



**The Incorporation People**  
A division of Corporate Representatives  
Pty Limited ABN 85 000 540 741

37 Gondola Road  
North Narrabeen NSW 2101

**Ph: 02 9999 3000**  
Fax: 02 9970 5814

**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 **\$297** Emailed as a PDF or **\$352** 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 **\$88** (incl. GST) would be payable in respect of this additional service.

**Please telephone on (02) 9999 3000  
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 \$77 – 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.  
 (including - Foreign Persons exclusion 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) 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 (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 or holds the office of director.
- **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 Principal.
- *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	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 <input type="checkbox"/> Approved client: A/c No.: .....
DELIVERY DETAILS	
Personal collection <input type="checkbox"/> Courier <input type="checkbox"/>	<b>Please note: The person placing the order is responsible for payment of the account</b>