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Client Details:

Company _____

Name _____ Email _____

Address _____

Delivery Address _____

Phone _____ Fax _____

DISCRETIONARY TRUST ORDER FORM

Name of Trust: **The** _____

Name of Settlor _____
(Must not be a beneficiary of the trust)

Address of Settlor _____

Name of Trustee _____

ACN of Trustee (Ignore if Trustee is a person) _____

Address of Trustee _____

Directors of Trustee Company _____

Directors/Secretary of Trustee Company _____

Date of Deed _____ Settled Sum _____

Name of Beneficiary 1	_____
Address of Beneficiary 1	_____
Name of Beneficiary 2	_____
Address of Beneficiary 2	_____
Name of Beneficiary 3	_____
Address of Beneficiary 3	_____
Name of Beneficiary 4	_____
Address of Beneficiary 4	_____
Name of Beneficiary 5	_____
Address of Beneficiary 5	_____
Name of Beneficiary 6	_____
Address of Beneficiary 6	_____

* The Appointer has ultimate control (namely, can appoint and discharge the Trustee). Accordingly, depending on the individual circumstances of the client, the Appointer can be a single person or two persons jointly (eg: Husband and Wife).

** The deed provides that the beneficiaries include such persons as are related to the Appointor/Beneficiary as follows:

- the spouse, children and remote descendants of such children, brothers, sisters parents,
- children and remote descendants of such brothers and sisters and spouses of any of the foregoing.

Generally, the Beneficiary would be the husband, the wife or both the husband and wife. The latter is recommended where there are children of previous marriages. Note also that the beneficiaries include companies and trusts associated with all the persons named