



# AJML GROUP

PUBLIC ACCOUNTANTS & TAX AGENTS

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SYDNEY NSW 2000

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SYDNEY SOUTH NSW 1235

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## Client Contact Details (who should be contacted for further details)

Company \_\_\_\_\_

Name \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

Delivery Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

**Please Note:** The unit trust deed created pursuant to this order will be a fixed trust for the purposes of the NSW Land Tax Management Act 1956.

## INSTRUCTION SHEET FOR UNIT TRUST

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Date of Deed \_\_\_\_\_

**Name of Trust**                      The \_\_\_\_\_

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

Address of Settlor \_\_\_\_\_  
\_\_\_\_\_

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Name of Trustee \_\_\_\_\_

ACN of Trustee \_\_\_\_\_  
(Ignore if Trustee is a person)

Address of Trustee \_\_\_\_\_

Directors of Trustee \_\_\_\_\_

Chairman of Trustee \_\_\_\_\_

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**Name of 1st Unit holder** \_\_\_\_\_

Company ACN (if applicable) \_\_\_\_\_

Address of 1st Unit holder \_\_\_\_\_

Number of units to be held \_\_\_\_\_

If 1st Unit holder is a company – names of Directors attending Directors Meeting  
\_\_\_\_\_

Chairman of Directors of Unit holder Company \_\_\_\_\_

Does the Company have a Common Seal? YES/NO  
\_\_\_\_\_

**Name of 2nd Unit holder** \_\_\_\_\_

Company ACN (if applicable) \_\_\_\_\_

Address of 2nd Unit holder \_\_\_\_\_

Number of units to be held \_\_\_\_\_

If 1st Unit holder is a company – names of Directors attending Directors Meeting  
\_\_\_\_\_

Chairman of Directors of Unit holder Company \_\_\_\_\_

Does the Company have a Common Seal? YES/NO  
\_\_\_\_\_

**Name of 3rd Unit holder** \_\_\_\_\_

Company ACN (if applicable) \_\_\_\_\_

Address of 3rd Unit holder \_\_\_\_\_

Number of units to be held \_\_\_\_\_

If the 3rd Unit holder is a company – names of Directors attending Directors Meeting  
\_\_\_\_\_

Chairman of Directors of Unit holder Company \_\_\_\_\_

Does the Company have a Common Seal? YES/NO  
\_\_\_\_\_