

DEED OF SUCCESSION TO DISCRETIONARY TRUST

**Please complete all details in block letters.*

NAME OF TRUST _____

SETTLED SUM (if other than \$10) _____

SECTION A: PERSON ORDERING TRUST

PERSON ORDERING TRUST _____ **Signature** _____

(documents and invoice will be directed to this person, unless otherwise stated)

Company name (if applicable) _____

Street address _____

Postal address, if different _____

Phone _____ Fax _____ Email _____

SECTION B: TRUSTEE DETAILS (Note: Corporate trustee is preferred)

If the Trustee is a company then complete section B(I) only. If the Trustees are individuals then complete section B(II) only.

SECTION B(I) : TRUSTEE INFORMATION WHERE TRUSTEE IS A COMPANY

Name _____ ACN _____ - _____

Date of Incorporation ____ / ____ / ____

Address of Registered Office _____

Phone _____ Fax _____ Email _____

Full names of all directors of trustee company

T1		T2	
T3		T4	

Go to section C on next page

SECTION B(II) TRUSTEE INFORMATION WHERE TRUSTEE IS AN INDIVIDUAL/GROUP OF INDIVIDUALS

If **individual** trustee(s), their full names and addresses:

T 1	Full Name	
	Street Address	

T 2	Full Name	
	Street Address	

T 3	Full Name	
	Street Address	

T 4	Full Name	
	Street Address	

SECTION C: DETAILS OF EACH MAIN BENEFICIARY

Typically the person(s) establishing the Trust (eg, husband and wife) are the main beneficiaries.

MB 1	Full Name	T1? <input type="checkbox"/>	
	Street Address		

MB 2	Full Name	T2? <input type="checkbox"/>		<i>Relationship to Main Beneficiary (MB1)</i>
	Street Address			Spouse? <input type="checkbox"/>

SECTION D: DETAILS OF EACH APPOINTOR

The Appointor holds the ultimate control over the Trust (eg, appointing and removing the trustee).

A 1	Full Name	T1? <input type="checkbox"/>	
	Street Address		

A 2	Full Name	T2? <input type="checkbox"/>		<i>Relationship to Appointor (A1)</i>
	Street Address			Spouse? <input type="checkbox"/>

SECTION E: DETAILS OF THE SUCCESSOR APPOINTORS

If you wish to provide for succession to the role of this Appointor please complete this section. Completion of this section is preferred but optional.

SA 1	Full Name	T1? <input type="checkbox"/>		<i>Relationship to Main Beneficiary (MB1 or MB2?)</i>
	Street Address			Spouse? <input type="checkbox"/>

SA 2	Full Name	T2? <input type="checkbox"/>		<i>Relationship to Main Beneficiary (MB1 or MB2?)</i>
	Street Address			Spouse? <input type="checkbox"/>

SECTION F: DETAILS OF THE SETTLOR – Settlor should not be related to, or remunerated by, the main beneficiaries.

S 1	Full Name	
	Street Address	

SECTION G: SPECIAL INSTRUCTIONS

Note that DBA is not licensed to provide financial product advice under the *Corporations Act 2001* (Cth).