

## DISCRETIONARY TRUST DEED *Please complete all details in block letters.*

date: \_\_\_\_\_  
email address: \_\_\_\_\_  
from (your firm name): \_\_\_\_\_ ref: \_\_\_\_\_

### PLEASE SEND DOCUMENTS FOR EXECUTION

by overnight courier   
by overnight courier tomorrow   
by local courier   
by email   
in due course

### NAME OF TRUST

full name of trust \_\_\_\_\_

### TRUSTEE DETAILS

full name (ACN/ARBN/ABN if applicable) \_\_\_\_\_

directors names (if applicable) \_\_\_\_\_  
\_\_\_\_\_

residential address / registered office \_\_\_\_\_

state \_\_\_\_\_ postcode \_\_\_\_\_

### PRINCIPAL DETAILS

full name of principal \_\_\_\_\_

residential address / registered office \_\_\_\_\_

state \_\_\_\_\_ postcode \_\_\_\_\_

**n.b. the principal has power under the trust deed to appoint a new trustee or nominate additional beneficiaries**

**NAMED PRIMARY  
BENEFICIARIES**

full names

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**ACCOUNTANTS OF TRUST**

firm name

address

state

postcode

email address

contact person

phone

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**BANKER OF TRUST**

bank

branch address

state

postcode

email address

contact person

phone

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**ANY FURTHER INSTRUCTIONS**


