



MackeyWales

L A W

ORDER FORM – NEW TRUST

**Please complete all details in block letters*

SECTION 1: TRUSTEES

TRUSTEE 1

FULL NAME			
ADDRESS (street)			
POSTAL ADDRESS		TAX FILE NO.	
EMAIL ADDRESS			
PHONE NUMBERS	(W) (H)	(M) (F)	
DATE OF BIRTH		PLACE OF BIRTH	

TRUSTEE 2

FULL NAME			
ADDRESS (street)			
POSTAL ADDRESS		TAX FILE NO.	
EMAIL ADDRESS			
PHONE/FAX NUMBERS	(W) (H)	(M) (F)	
DATE OF BIRTH		PLACE OF BIRTH	

Built on reputation

Principals

Terry Fanning
Ross Greatrex

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Mackey Wales Law Pty Ltd ACN 618 672 030

Liability limited by a scheme approved under professional standards legislation

NOTE: If there are more trustees, please copy page and fill in further details.

SECTION 2: ACCOUNTANTS

FIRM NAME	ACCOUNTANT
ADDRESS	PHONE: EMAIL:

SECTION 3: BANKING

BANK	CONTACT PERSON
BRANCH ADDRESS	PHONE: EMAIL:

SIGNATORIES TO CHEQUES either trustee ☐ both trustees ☐ any trustee ☐

SECTION 4: BUSINESS DETAILS

PRINCIPAL ACTIVITY.....

BUSINESS ADDRESS.....

SECTION 5: DISCRETIONARY TRUST

FULL NAME OF TRUST (eg. Brown Family Discretionary Trust)

.....

Is the trustee to be a beneficiary of the Trust? ☐ Yes ☐ No

We recommend that there not be an individual trustee as we have had the ATO argue that for tax purposes there is no trust where the sole trustee is also a beneficiary so all the income is taxed to the trustee and not as distributed.

Are Capital Beneficiaries restricted to direct descendants of Primary Beneficiary? ☐ Yes ☐ No

Vesting Date of Existing Trust if applicable /...../.....

SECTION 6: PRIMARY BENEFICIARIES

PRIMARY BENEFICIARIES

.....

SECTION 7: PRINCIPALS

PRINCIPALS

