

## Credit Card Details

Visa       Master Card       American Express

\* American Express cards will attract a 2.75% surcharge

Name on card: \_\_\_\_\_

Card Number: \_\_\_\_\_

Expiry Date: \_\_\_\_\_ \$484.00

Signature: \_\_\_\_\_



Disclaimer - We do not provide legal, accounting or stamp duty advice and therefore take no responsibility for your taxation, legal or other liabilities which may arise from the work we perform on your instructions. We urge you to first obtain legal and accounting advice in relation to your affairs and in particular this transaction.

PLEASE NOTE THIS FORM OF TRUST DOES NOT EXCLUDE 'FOREIGN PERSONS' FROM THE CLASS OF BENEFICIARIES FROM THE TRUST. IF IT IS INTENDED THAT THE TRUST WILL PURCHASE REAL ESTATE IN AUSTRALIA, THEN DEPENDING ON THE NATURE OF THE REAL ESTATE AND THE STATE/TERRITORY IN WHICH IT IS LOCATED THE TRUST MAY BE LIABLE TO PAY ADDITIONAL SURCHARGE STAMP DUTY ON THE PURCHASE AND ADDITIONAL SURCHARGE LAND TAX ON AN ONGOING BASIS. WE RECOMMEND THAT YOU SEEK LEGAL AND/OR TAX ADVICE ON THESE ISSUES TO ENSURE THAT THE FORM OF TRUST ORDERED IS APPROPRIATE GIVEN YOUR PARTICULAR CIRCUMSTANCES.

PLEASE CONTACT US SHOULD YOU REQUIRE A TRUST WHICH EXCLUDES 'FOREIGN PERSONS' FROM THE CLASS OF BENEFICIARIES.

## DISCRETIONARY TRUST ORDER FORM

**Name of Trust:** \_\_\_\_\_

State of jurisdiction: \_\_\_\_\_

**Date of Deed:**       \_\_\_\_\_       to be left blank

**Name of Settlor** \_\_\_\_\_

(NB Must not be a beneficiary of the trust)

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

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

ACN of Trustee (N/A if Trustee is a person) \_\_\_\_\_

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

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

(N/A if Trustee is a person)

Chairman of Directors of Trustee Company \_\_\_\_\_

**Settled Sum** \_\_\_\_\_

**Appointor/Beneficiary \*\***

Name \_\_\_\_\_

Address \_\_\_\_\_

Appointor  Beneficiary

Name \_\_\_\_\_

Address \_\_\_\_\_

Appointor  Beneficiary

**\*** **NOTE:** Please consider carefully your choice of trustee. There are wide ranging implications should you decide to change the trustee of this trust. These implications could include the payment of ad valorem stamp duty or precluding the new, continuing and retiring trustees from benefiting under the trust. We urge you to obtain clear legal, accounting and stamp duty advice particularly in relation to this aspect of your instructions to us.

**\*\*** 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.

If the Discretionary Trust is for one family, and a family trust election is to be made, the Appointors must be within the 'family' as defined (Section 272-95 of Schedule 2F of the 1936 Act as recently amended), of the 'primary individual', or lawyer(s) or financial adviser(s) for any family member (Section 272-87(1)(b) and (2)(a) of Schedule 2F).

The deed provides that the beneficiaries include such persons as are related to the Appointor and or 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,
- where the trustee is a company or companies, each Trustee in its corporate capacity, and where the Trustee is a natural person or persons, each Trustee in his personal capacity.

**Default Beneficiary**

If you wish to add a Default Beneficiary in the event that Trust Fund does not vest as contemplated in the Deed ie the trustee making a determination on or before the vesting date please complete the following section. The deed provides for the naming of two (2) default beneficiaries. If the first default beneficiary is not in existence on the distribution date, the fund will be held for the second default beneficiary to the intent that there shall be no Resulting Trust to the Settlor or any Additional Settlor.

Name of first Default Beneficiary: \_\_\_\_\_

Name of second Default Beneficiary: \_\_\_\_\_

**Your Details:**

**By completing this form you agree to the trading terms and conditions of Corporate Express found on [www.corporateexpress.com.au](http://www.corporateexpress.com.au)**

Name \_\_\_\_\_

Contact \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

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

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