

Discretionary Trust Order Form



1. Trust Details

Date of Discretionary Trust:

The date should be on the day on which both the Settlor and Trustee sign the trust deed.

Name of Discretionary Trust:

Unlike choosing a company name there is no prohibition on the name chosen for a Discretionary Trust. It should be kept in mind however that you will need to cite the name of the trust in all transactions. It is not necessary to include "the" at the start of the name of the trust, but please include the word "Trust" at the end.

Name of Settlor:

The person who settles the trust must be a person unrelated to the range of beneficiaries under the trust such as an accountant.

State of Applicable Law:

New South Wales, Victoria, ACT, SA, WA, Tasmania, Queensland

2. Trustee Details

If the Trustee is a Company:

Name and ACN:

Including ACN for eg YOUR COMPANY PTY LTD ACN 000 000 00

Company Address:

Use either Registered Office Address or Business Office Address

If the Trustee(s) are Individuals:

Name of First Trustee:

Whenever an individual is to be referred to in the trust deed, their full names should be used (ie including their middle name).

Name of Second Trustee:

3. Beneficiary Details

Name of First Principal Beneficiary: _____

Where a discretionary trust is being established for the benefit of a family, it is not necessary that parents and children are specifically named as Principal Beneficiaries. You can either refer specifically to the parents or the children.

Name of Second Principal Beneficiary: _____

4. Principal (Appointor) Details

If Succession (of the Principal) is to be Controlled (ie. a replacement Principal is to be named)

Name of First Principal(s): _____

The Principal (also known as Appointor) is the person who has the power to remove and appoint trustees of the trust without their consent. You can appoint more than one person to act as the First Principal. Whenever an individual is to be referred to in the trust deed their full names should be used (ie including their middle name).

Name of Successor Principal(s): _____

The Principal (also known as Appointor) is the person who has the power to remove and appoint trustees of the trust without their consent. You can appoint more than one person to act as the Successor Principal. Whenever an individual is to be referred to in the trust deed their full names should be used (ie including their middle name).

If Succession (of the Principal) is NOT Controlled:

Name of Principal(s): _____

The Principal (also known as Appointor) is the person who has the power to remove and appoint trustees of the trust without their consent. You can appoint more than one person to act as the Principal. Whenever an individual is to be referred to in the trust deed their full names should be used (ie including their middle name).

5. Client Details

Name of Client: _____

Address of Client: _____

Ordered By: _____

Signature: _____