

## FAMILY TRUST / DISCRETIONARY TRUST INSTRUCTION FORM

<b><u>Trust Name</u></b>
The .....Trust

<b><u>Trustee</u></b> (The Trustee can be one or more individuals or companies)
Full Name: ..... (and ACN if a company)
Address: .....

<b><u>Settlor</u></b> (The Settlor can be your accountant or lawyer. The Settlor establishes the trust but takes no further part in the Trust and cannot benefit from it)
Full Name: .....
Address: .....

<b><u>Appointor(s)</u></b> (The Appointor "controls" the Trustee and can remove the Trustee at will. The Appointor can be more than one person and the same entity as the Trustee)
Full Name(s): .....
Address(es): .....

<b><u>Successor Appointor(s)</u></b> (This is the person(s) who has "control" over the Trust if the Appointor dies or becomes legally incapable. Can be more than one Successor Appointor)
Full Name(s): .....
Address(es): .....

<b><u>Specified (Default) Beneficiaries</u></b> (In a family trust, the Specified Beneficiaries are usually the husband and wife and/or their children – known as "takers in default")
Full Name(s): .....
.....

Our fees (from 1 July 2023) for establishing a family trust / discretionary trust are \$495 + GST + any disbursements, which includes a bound copy of the Trust Deed plus an electronic pdf copy of the Trust Deed (if requested). If you require more than one family trust, please speak to us as we may be able to offer you a discount.

Please speak to us if you need us to form a company for you to act as a corporate trustee. Usual costs for forming a corporate trustee are \$1,500 + GST which includes a full company folder, ASIC forms, starter minutes and a Constitution.

Any changes to your requirements may incur extra costs. Please call us to discuss how we can best help you.

<b><u>Your Details</u></b>
Signed: ..... Date: .....
Full Name: ..... (ACN .....
Address: .....
Telephone: ..... (mobile) ..... (other e.g. work/home)

Please print, complete, and return this form by email or post to:

**Balfour Meagher Legal & Business Advisors**

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