

## Instruction Sheet Discretionary Trust Deed

Use this document to place an order for a Discretionary Trust deed.

**Please provide the following contact information:**

AR No. (Office use only)

Your full Name

Organisation

Street Number and Name

Suburb

State

Postcode

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Postal Address

Postal Suburb

State

Postcode

--	--

Telephone

Mobile

Facsimile

Email

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**Name of Trust**

**Trustee 1 (there may be more than one Trustee)**

Full Name

Street Number and Name:

Suburb

State

Postcode

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ABN/ACN of Trustee (if a company)

Name of Director 1 of Trustee company

Name of Director 2 (if applicable)

Name of Director 3 (if applicable)

Name of Director 4 (if applicable)

**Trustee 2 (there may be more than one Trustee)**

Full Name

Street Number and Name:

Suburb

State

Postcode

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ABN/ACN of Trustee (if a company)

Name of Director 1 of Trustee company

Name of Director 2 (if applicable)

Name of Director 3 (if applicable)

Name of Director 4 (if applicable)

**Settlor (must *not* be a Beneficiary)**

Full Name

Street Number and Name:

Suburb

State

Postcode

**Appointor 1 (may have more than one)**

Full Name

Street Number and Name:

Suburb

State

Postcode

**Appointor 2 (if applicable)**

Full Name

Street Number and Name:

Suburb

State

Postcode

**Principal Beneficiary 1 (may have more than one)**

Full Name

Street Number and Name:

Suburb

State

Postcode

**Principal Beneficiary 2 (if applicable)**

Full Name

Street Number and Name:

Suburb

State

Postcode

**Controller 1 (Controller Optional, may have more than one)**

Full Name

Street Number and Name:

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Suburb

State

Postcode

**Controller 2 (if required)**

Full Name

Street Number and Name:

Suburb

State

Postcode

**Settlement Sum**

\$ (e.g. \$100.00)

**Proper Law (e.g. NSW, Victoria etc)**

**Excluded Class**

Full Name

Street Number and Name:

Suburb

State

Postcode

ABN/ACN (if a company)

Name of Director 1 of Trustee company

Name of Director 2 (if applicable)

Description

**Please enter any special instructions for InvestorOne. (e.g. delivery or additional details) or please phone us on 02 9231 5111.**

**Please print a copy of the completed form for your records.**

**Please select File then Save As and save a copy of the form as the same name as the trust (i.e. thesmithtrust.pdf) and email to [orders@investorone.com.au](mailto:orders@investorone.com.au)**