



Discretionary Trust Instructions

Name of Trust:

A trust name can be identical to another trust name. There is no requirement to check the availability of a trust name. A trust will normally trade under the name of the trustee or under a registered business name.

Date of Documents: Leave undated Today's date Future date(enter date)
Please note that documents can not be back dated.

Register Type: Normal (1" spine) Wide (1.5" spine) Combine with company register

TRUSTEE DETAILS

The trustee has legal ownership of the assets of the trust. Where a trust is being used as an asset protection vehicle it is important that the trustee is separate to the beneficiaries so that there can be no confusion that the trustees own the assets for their own benefit. There is a principal at common law that a person can not hold assets for themselves therefore a sole individual trustee can not also be the sole individual specified beneficiary. Where a trustee is **ONLY** acting as trustee of the trust there is no requirement to register the trustee for an ABN or tax file number. You only need to register the trust.

Name of Trustee:
A.C.N. or 2nd Trustee:
Address:
Town: State: Postcode:
Directors (Chairman first)
.....

SETTLOR DETAILS

Under taxation law a trust can only be taxed as family trust where the settlor is not a beneficiary of the trust. The settlor must not be able to benefit from the trust either directly or indirectly. The settlor should be a person totally independent of the Trust.

Name of Settlor Settled Sum: \$10.00 or
Address:
Town: State Postcode

APPOINTOR DETAILS

The appointor has the power to remove and appoint trustees of the trust. Therefore the appointor has effective control over the trust.

Name: and Jointly
Address:
Town: State Postcode
And upon their death:

BENEFICIARIES

The specified beneficiaries are entitled to the capital of the trust upon vesting. Where the profit of the trust is distributed each year then the capital will usually only be the settled sum. The specified beneficiaries are usually described as "the children of" as this provides further asset separation from the trustees (or directors of the trustee) where those people are the parents. Where there are no children the you should add other persons as additional specified beneficiaries.

Our standard general beneficiary clause includes relatives and related entities of the specified beneficiaries.

Excluded Beneficiaries are not allowed to receive a distribution. This includes the Trustee unless the trustee is specifically named as a General Beneficiary. It also includes the Settlor. If you wish to exclude other people (such as an ex spouse) then they should be named here.

Specified Beneficiaries - the children of:

Address:

Town: State Postcode

Additional Specified Beneficiaries:

Additional General Beneficiaries:

Excluded Beneficiaries:

ADDITIONAL INSTRUCTIONS

APPLICANT DETAILS

Applicant Details:

Customer No:

Firm Name:

Contact Person: Phone:

Street Add: Fax:

Postal Add: DX:

Email Address: tick for PDF Only, No Register

Please Deliver to: Street Address / Postal Address / Other:

The applicant hereby accepts full responsibility for any amount payable to CST Corporate Solutions Pty Ltd for the enclosed instructions.

signed:

date:

Payment Details: Chq Encl. Chq in Mail Direct Deposit

or Charge our Credit Card: Bankcard Visa Mastercard Amount:

Card Number: Expiry Date:

Name of Cardholder Signature