

ORDERING CHECKLIST

Discretionary Trust Establishment

Outlined below is a checklist of the information needed to complete a Discretionary Trust order.

TRUST DETAILS

- Name of the Trust
- State of registration of the Trust
- Meeting address of the trustees of the Trust

SETTLOR DETAILS

- Full name and address of the Settlor
- Settled sum amount

APPOINTOR DETAILS

- Full name, address and successor for each Appointor (nominating a successor is optional)

If the Appointor is a company:

- The ACN of the company

TRUSTEE DETAILS

If the Trust has individual trustees:

- Full name and address of each individual trustee
- Chairman of the Trustees

If the Trust has a corporate trustee:

- Name of the company
- ACN of the company
- Full name and address of each director of the company
- Chairman of the company
- Registered address of the company

SPECIFIED BENEFICIARY DETAILS

- Full name and address of each Specified Beneficiary
- ACN of the Specified Beneficiary (if a company)

GENERAL BENEFICIARY DETAILS

- Full name and address of each General Beneficiary
- ACN of the General Beneficiary (if a company)

Should you have any queries regarding this checklist, please contact the team at Topdocs on 1300 659 242.