

DOCUMENTATION CONTENTS

Discretionary Trust Establishment

Outlined below is the list of documents you will receive with your order.

FULL SERVICE DELIVERY

- > 2 bound copies of the Discretionary Trust Deed
- > 1 unbound copy of the deed to scan
- > High quality leather look binder indexed with tabs to store your documents in
- > A USB containing a copy of all prepared documents
- > Trustee minutes to establish the Trust, and to have the local Revenue Office stamp the Trust Deed
- > Detailed information on how to have the Trust Deed stamped by the local Revenue Office, including a covering letter
- > Information on how to open a bank account in the name of the Trustee/s
- > Register of Beneficiaries

INSTANT EMAIL DELIVERY

- > Copy of the Discretionary Trust Deed
- > Trustee minutes to establish the Trust, and to have the local Revenue Office stamp the Trust Deed
- > Detailed information on how to have the Trust Deed stamped by the local Revenue Office, including a covering letter
- > Information on how to open a bank account in the name of the Trustee/s
- > Register of Beneficiaries

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