



**INSTRUCTION SHEET FOR DISCRETIONARY TRUST**

1. **Instructions from:** .....

2. **Documents to be sent to:** .....

3. **Name of Trust:** .....

4. **Settlor:**

Name: .....

Address: .....

.....

5. **Trustee:**

Name: .....

Address: .....

.....

6. **If Trustee is a company:**

ACN: .....

Directors: .....

.....

7. **Settled Sum:**

\$.....

8. **Primary Beneficiaries:**

(usually the client's children i.e. "The children of .....")

Name: .....

Address: .....

.....

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Name: .....

Address: .....

.....

**9. Additional Beneficiaries:**

(additional beneficiaries beyond the client's family, if required)

For example:

(A) .....  
and anyone who is related by blood or marriage to that person.

Or

(B) .....AND

.....

and anyone who is related by blood or marriage to either of them.

Or

(C) The following individuals, trusts or companies:

Name: .....

Address: .....

.....

**10. Default Beneficiaries**

(the person or persons who will be deemed to have received the net income of the Trust each financial year in the absence of a determination by the Trustee (usually the client and/or the client's spouse))

Name: .....

Address: .....

.....

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**11. Nominated Person:**

(the person (or persons in shares adding up to 100%) whose next of kin would receive the capital of the trust on vesting if the trustee does not make a determination)

Name: .....

Address: .....

.....

**12. Appointor**

(the person who holds power to appoint and replace the Trustee, and exercise other powers of veto over the Trustee's actions). Select one of the following and complete.

(A) .....

Or

(B) .....

and upon his/her death:

.....

Or

(C) Such of:

.....

and .....

then living and if more than one then acting jointly.