

INSTRUCTION FORM: DISCRETIONARY/FAMILY TRUST

YOUR DETAILS

I am an advisor to an individual seeking to set up a discretionary/family trust
 an individual seeking to set up a discretionary/family trust

Full name

Address

Phone

Email

DETAILS OF TRUST

Name of Trust

SETTLOR

(Cannot be a beneficiary)

I want:

a representative from Lynch Meyer to be the settlor

my advisor to be the settlor

Full name

Address

Settlement sum (\$)

TRUSTEE

Trustee #1

The trustee is a company an individual

_____ ACN (if applicable)

Trustee #2

The trustee is a company an individual

_____ ACN (if applicable)

Trustee #3

The trustee is a company an individual

_____ ACN (if applicable)

Trustee #4

The trustee is a company an individual

_____ ACN (if applicable)

If you have additional trustees, please include all relevant details in the textbox at the end of this form.

MAIN BENEFICIARIES*

Main beneficiary #1

Full name

Address

Main beneficiary #2

Full name

Address

Main beneficiary #3

Full name

Address

Main beneficiary #4

Full name

Address

(Please advise if you require different income and capital beneficiaries)

*If husband and wife, their full names are sufficient. Our standard Deed includes children and other usual relatives and associated companies and trusts. If other beneficiaries are to be named, please state relationship of named beneficiaries.

If you have additional main beneficiaries, please include all relevant details in the textbox at the end of this form.

APPOINTOR

Tick yes if same as main beneficiaries

Appointor #1

Full name

Address

Appointor #2

Full name

Address

Appointor #3

Full name

Address

Are there any other instructions we should know (including additional trustees etc)?

BILLING

Your chosen payment method:

Cheque in mail

Direct deposit

Bankcard

Mastercard

Visa

Please send me an invoice, which I agree to pay within 14 days

Card number

Name of cardholder

Expiry date

Direct deposit details:

National Bank Australia (Pirie Street)

BSB: 085-005 Account: 525 554 575

Reference: "Shelfdocs [INSERT YOUR COMPANY NAME HERE]"