



PLEASE NOTE to have a valid trust you can **NOT** have a sole individual trustee who is also the sole Unitholder. Eg. James Paul Smith can not be a sole trustee and sole unitholder.  
If you require further information please speak to one of our specialist Solicitors on (07) 3230 5222.

**General Details of Unit Trust**

Date of Unit Trust Deed: \_\_\_\_\_  
*The date should be the day on which both the Trustee and the Unitholders sign the trust deed.*

Name of Unit Trust: \_\_\_\_\_  
*Unlike choosing a company name there is no prohibition on the name chosen for a Unit Trust. It should be kept in mind however that you will need to cite the name of the trust in all transactions. It is not necessary to include "the" at the start of the name of the trust but please include the word "Trust" at the end.*

Price of Each Unit: \_\_\_\_\_  
*In most circumstances, the trustee of the Unit Trust will issue units for one dollar (\$1.00).*

State of Applicable Law: QLD NSW VIC ACT TAS SA WA NT

Name and Address of Client: \_\_\_\_\_  
*The details of the person(s) to whom the trust deed will be sent for signing should be inserted here as if they were to appear on the top of the letter.*

Salutation: \_\_\_\_\_  
*For the letter, it is only necessary to type the name/s. The word "Dear" is already in the document.*

**If the Trustee is a company**

Name and ACN: \_\_\_\_\_  
*Including ACN for example YOUR COMPANY PTY LTD ACN 000 000 000*

Is there more than one director?: Yes No

**If the Trustee(s) are individual(s) (max 4)**

Name of First Trustee: \_\_\_\_\_  
*Whenever an individual is to be referred to in the trust deed their full names should be used (ie including their middle name).*

Name of Second Trustee: \_\_\_\_\_

Name of Third Trustee: \_\_\_\_\_

Name of Fourth Trustee: \_\_\_\_\_

### UNITHOLDER DETAILS

#### Corporate Unitholder(s) Details (max 15) *(include corporate unitholders that will hold units as trustees)*

##### Corporate Unitholder #1

Name and ACN: \_\_\_\_\_

*For example, if the Company is acting as trustee type company name ACN and trust name eg. COMPANY PTY LTD ACN 123 456 789 AS TRUSTEE OF THE SMITH TRUST. If the company is holding units in its own right simply type company name and ACN eg COMPANY PTY LTD ACN 123 456 789*

Address: \_\_\_\_\_

*This must be the company's registered office.*

Number of Units subscribed to: \_\_\_\_\_

*In most circumstances, it would be appropriate that each unitholder is issued ten (10) units.*

Distinctive Numbers of the Units From and To: \_\_\_\_\_

*Where the first unitholder has been issued ten (10) units, those units would be numbered 1-10. A second unitholder who has been issued ten (10) units would have their units numbered 11-20.*

Certificate Number of Units: \_\_\_\_\_

*Where the first unitholder has been issued ten(10) units, the unit certificate would be number 1. A second unitholder who has been issued ten (10) units would have their unit certificate numbered 2.*

##### Corporate Unitholder #2

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_

Certificate Number of Units: \_\_\_\_\_

##### Corporate Unitholder #3

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_

Certificate Number of Units: \_\_\_\_\_

##### Corporate Unitholder #4

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_

Certificate Number of Units: \_\_\_\_\_

##### Corporate Unitholder #5

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_

Certificate Number of Units: \_\_\_\_\_

**Corporate Unitholder #6**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Unitholder #7**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Unitholder #8**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Unitholder #9**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Unitholder #10**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Unitholder #11**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Unitholder #12**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Unitholder #13**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Unitholder #14**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Unitholder #15**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder(s) Details (max 15)** *(include individual unitholders that will hold units as trustees)***Individual Unitholder #1**

Name: \_\_\_\_\_

*For example if the individual is acting as trustee type individual name and trust name - eg. FRED SMITH AS TRUSTEE OF THE SMITH TRUST, if more than one individual acting as trustee of the trust eg. FRED SMITH AND PETER SMITH AS TRUSTEE OF THE SMITH TRUST. If the individual is holding units in its own right simply type individual name - eg. FRED SMITH.*

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #2**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #3**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #4**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #5**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #6**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #7**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #8**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #9**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #10**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #11**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #12**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #13**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #14**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Unitholder #15**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**SPECIAL UNITHOLDER DETAILS (if applicable)***(Special Units can be issued to allow the trustee to make discretionary distributions to those holders of units with the consent of the ordinary unitholders.)***Corporate Special Unitholder(s) Details (max 10) (include corporate unitholders that will hold units as trustees)****Corporate Special Unitholder #1**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Special Unitholder #2**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Special Unitholder #3**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Special Unitholder #4**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Special Unitholder #5**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Special Unitholder #6**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Special Unitholder #7**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Special Unitholder #8**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Special Unitholder #9**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Corporate Special Unitholder #10**

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder(s) Details (max 10)** *(include individual unitholders that will hold units as trustees)***Individual Special Unitholder #1**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder #2**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder #3**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder #4**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder #5**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder #6**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder #7**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder #8**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder #9**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder #10**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_ Certificate Number of Units: \_\_\_\_\_