

**General Details of Discretionary Trust**

Date of Discretionary Trust: \_\_\_\_\_  
*The date should be the day on which both the Settlor and Trustee sign the trust deed*

Name of Settlor: \_\_\_\_\_  
*The person who settles the trust must be a person unrelated to the range of beneficiaries under the trust such as an accountant.*

Name of Discretionary Trust: \_\_\_\_\_  
*Unlike choosing a company name there is no prohibition on the name chosen for a Discretionary 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.*

Name of Principal Beneficiaries: \_\_\_\_\_  
*Where a discretionary trust is being established for the benefit of a family, it is not necessary that parents and children are specifically named as Principal Beneficiaries. You can either refer specifically to the parents or the children.*

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*

**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: \_\_\_\_\_

**SUCCESSION DETAILS**

The Principal is the person who has the power to remove and appoint trustees of the trust without their consent. You can if you wish appoint a Successor Principal who will automatically assume that position on the death of the First Principal.

**Where Succession is Controlled**

Name of First Principal: \_\_\_\_\_

*The Principal is the person who has the power to remove and appoint trustees of the trust without their consent. You can appoint more than one person to act as the First Principal. 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 Successor Principal: \_\_\_\_\_

*The Principal is the person who has the power to remove and appoint trustees of the trust without their consent. You can appoint more than one person to act as the Successor Principal. Whenever an individual is to be referred to in the trust deed their full names should be used (ie including their middle name).*

**Where Succession is NOT Controlled**

Name of Principal(s): \_\_\_\_\_

*The Principal is the person who has the power to remove and appoint trustees of the trust without their consent. You can appoint more than one person to act as the Principal. Whenever an individual is to be referred to in the trust deed their full names should be used (ie including their middle name).*