

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: _____ Certificate Number of Units: _____
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. *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: _____