

## Hybrid Trust Package Information Checklist

- The name of the trust
- The name and address details of:
  - the trustee(s)
  - unit holder(s)

If a trustee or a unit holder is a company, then give:

- its ACN or ABN
- its authorised representative (and whether they are a Director or Secretary of the company)

- The name and address of the settlor
- Amount the settlor is contributing to settle the trust — that is, the amount of the settled sum
- Whether each unitholder will hold these units on trust for someone

If "yes", then you give the name of the individual or entity for whom the units are held on trust

- The unit price
- For each unitholder give the following information for each type of unit they are applying for:
  - type of unit
  - number
  - amount paid
  - amount owing on the units

- Whether the Trustee is to be excluded from being a beneficiary of the trust



To create the documents to form a Hybrid Trust, you need to provide the information listed to the left. You might like to print this checklist out and gather the information before you start online.

Client Notes

- Trustee meetings details including:
- Who will attend the meeting to establish the trust
  - Who will chair the meeting
  - The venue, date and time that the meeting will be held

If a trustee is a company, then whether it will execute the trust deed by fixing its common seal

### Printing and Binding

- For an additional \$49.50, do you want Cleardocs to print, bind and express courier deliver these documents to you?