

## Discretionary Trust Information Checklist

- The name of the Trust
- The date the deed will be established
- The name and address details of:
  - the settlor,
  - the trustee(s)
  - the beneficiary(ies)
- If a trustee is a company, then give:
  - its ACN or ABN
  - its authorised representative (and whether they are a Director or Secretary of the company)
  - whether the trustee has a sole director
- If a beneficiary is an entity, then give:
  - its ACN or ABN
  - its authorised representative (and whether they are a Director or Secretary of the company)
- Whether the trustee(s) are to be excluded from being a beneficiary
- Which jurisdiction's laws apply to the trust deed
- Amount the settlor is contributing to settle the trust — that is, the amount of the settled sum
- Whether an appointer is to be named. If an appointer is named, then give address details.  
If the appointer is a company, then give:
  - give its ACN or ABN
  - give its authorised representative (and whether they are a Director or Secretary of the company)
  - whether the company will execute the deed by fixing its common seal



To create the documents to form a Discretionary 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

...continued

Any questions? Call our helpline on 1300 307 343

## Discretionary Trust Checklist Continued

- 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?

Client Notes