

## Unit Trust — fixed Package Information Checklist

This is the checklist for the Unit Trust — fixed. If you need a “Unit Trust — non-fixed”, then you need to get the checklist for that from [www.cleardocs.com/products-unit-trust.html](http://www.cleardocs.com/products-unit-trust.html).

- The name of the trust
- The date the deed will be established
- The name and address details of:
  - the trustee(s)
  - unit holder(s).
- If a trustee or a Unitholder is a company, then give:

  - its ACN or ABN
  - its authorised representative (and whether they are a Director or Secretary of the company)
- Which jurisdiction’s laws apply to the Trust Deed
- Whether each unitholder will hold these units on trust for someone.

If “yes”, then you will also need to give the name of the individual or entity for whom the units are held on trust
- For each unitholder give the following information for the units they are applying for:
  - type of unit
  - number
  - amount paid
  - amount owing on the units

### Printing and Binding

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



To create the documents to form a Unit Trust - fixed, 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