

To create a Change of Trustee Discretionary Trust document package, you need to provide the information listed to the left. Print this checklist out for convenience and gather the information before you start online.

## Change of Trustee Discretionary Trust

### Trust's current details

- Confirmation of:
  - trustee(s) name and address.
  - fixed or non-fixed unit trust.
  - initial unit holders' name(s) and address.
  
- Unit holder(s) that have been added to the trust:
  - sole or joint unit holdings.
  - confirm whether added unit holder(s) is a company or individual(s).
  - added unit holder(s) name and address.

### Retiring trustee(s) details

- Confirm whether any of the current trustees are retiring.
- Retiring trustee's address.
- If retiring trustee is a company, confirm how it will execute the document.

### New trustee(s) details

- Confirm if the new trustee is a company or one or more individuals.
  - if the new trustee is one or more individuals, then give their name(s) and address(es).
  - if the new trustee is a company, the company name, ACN and registered office address.
- Clause number in trust's current deed that allows trustee to retire.
- Clause number in trust's current deed that allows unit holder(s) to appoint new trustee.

### Meeting

- Details of the meeting, including:
  - attendees of the meeting.
  - person who will chair the meeting.
  - the venue, date and time that the meeting will be held.

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