

Change of Trustee Unit Trust

To create a Change of Trustee Unit 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.

Unit 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.
 - whether added unit holder(s) is a company or individual(s).
 - added Unit holder(s) name and address.

Notes

Retiring trustee(s) details

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

Notes

New trustee(s) details

- Confirm whether the new trustee is a company or one or more individuals:
 - if the new trustee is one or more individuals, provide their name(s) and address(es).
 - if the new trustee is a company, provide 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.

Notes

Meeting

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

Notes
