To arrange your trust's ABN registrations, you need to provide the information listed to the left. Print this checklist out for convenience and gather the information before you start online.

Discretionary Trust – excluded beneficiaries

Trust information

- ☐ The name of the trust.
- ☐ The date the deed will be established.
- ☐ Confirm the jurisdiction's laws that apply to the trust
- ☐ deed. The name and address details of the settlor.
- ☐ Amount the settlor is contributing to settle the trust — that is, the amount of the settled sum.

Appointor details

- ☐ Whether an appointer is to be named. If an appointer is named, then give address details.
- ☐ If the appointer is a company, then give:
  - its ACN or ABN.
  - name of the authorised representative (and whether they are a director or secretary of the company).

Trustee details

- ☐ The name and address details of the trustee(s).
- ☐ 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.
  - whether it will execute the trust deed by affixing its common seal.
- ☐ Whether the trustee(s) are to be excluded from being a beneficiary.
- ☐ Trustee meetings details including:
  - attendees of the meeting.
  - person who will chair the meeting.
  - the venue, date and time that the meeting will be held.

Notes

Beneficiary details

- [ ] The name and address details of the beneficiary(ies).
- [ ] 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).

Excluded beneficiaries

- [ ] Whether the deed is to exclude foreign persons from being beneficiaries.

Printing and binding

- [ ] For an additional price, do you want Cleardocs to print, bind and express courier deliver these documents to you?