

To create a Unit Trust – non-fixed 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 – non-fixed

- 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).
- Confirm which jurisdiction's laws apply to the Trust Deed.
- Whether each unitholder will hold these units on trust for someone, if yes:
 - provide the name of the individual or entity for whom the units are being held on trust.
- For each unit holder give the following information for any ordinary units they are applying for:
 - type of unit.
 - fully paid or partly paid (if ordinary units).
 - number.
 - amount paid.
 - amount owing on the units (if partly paid ordinary units).
- For each unit holder say whether they are getting an income unit, or if there is another person or entity getting an income unit. A unit holder may only have one income unit, the price must be \$1.00, it must be fully paid.

Notes

Printing and Binding

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

Notes
