

Discretionary Trust -

excluded beneficiaries

Information Checklist

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.

	Notes
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. 	







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	3
Whether the deed is to exclude foreign persons from being	
beneficiaries.	-
Whether the deed is to exclude persons who are not direct	
blood relatives from being beneficiaries.	
Printing and binding	
-	
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bind and express courier deliver these documents to you?	