

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

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

