

To create a Unit Trust – 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 – 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 unitholder give the following information for the units they are applying for:
  - type of unit.
  - number.
  - amount paid.
  - amount owing on the units.

### Notes

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## Printing and Binding

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

### Notes

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