

DISCRETIONARY TRUST ORDER FORM



Qorporate  
Services

\$480 incl GST, per Form

**Please seek advice from your accountant or solicitor in relation to establishing a trust and the type of trust that best suits you before completing this order form.**

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Name of Trust: \_\_\_\_\_

Address: \_\_\_\_\_

State of jurisdiction: \_\_\_\_\_

Name of Settlor \_\_\_\_\_  
(Must not be a beneficiary of the trust)

Address of Settlor \_\_\_\_\_

\_\_\_\_\_

Settled Sum \_\_\_\_\_

**Details of Trustee**

Trustee (If Individual):

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

Place of Birth \_\_\_\_\_

\_\_\_\_\_

State \_\_\_\_\_

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

Place of Birth \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Trustee (If Company):

Company Name and ACN \_\_\_\_\_

Address \_\_\_\_\_

Director(s) \_\_\_\_\_

Chairman of Trustee \_\_\_\_\_

**Beneficiaries** \_\_\_\_\_

Are beneficiaries' spouses?  Yes  No

Do you wish to exclude foreign beneficiaries from the trust?  Yes  No

If you are creating a family trust, tick this box if both parents (i.e. beneficiary 1 & 2) must be the parents of the children that are to be beneficiaries. Please note if you tick this box, you will exclude stepchildren and children from former relationships.  Yes

Name \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

**Appointor(s)** \_\_\_\_\_

First Appointor

Name \_\_\_\_\_

Address \_\_\_\_\_

Second Appointor

Name \_\_\_\_\_

Address \_\_\_\_\_

Do you consent to Qorporate Service managing \_\_\_\_\_  
the trust register?

Deed Stamped? (Additional fees apply, varies per state) \_\_\_\_\_

Tax Registrations? (free) \_\_\_\_\_

Please circle the tax registrations required:    ABN    TFN    GST    PAYG

**Declaration:**

I declare that the information provided in this form is true and correct. I declare that I am authorised to provide you instructions to complete this transaction.

Name \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

Signature: \_\_\_\_\_

**By completing this form, you acknowledge that Qorporate Services will act as the lodging agent for all forms to be lodged with ASIC relating to this order.**

**EMAIL THIS FORM TO: [Qorporateservices@outlook.com](mailto:Qorporateservices@outlook.com)**

**If you need to register a company to be the trustee of this trust, please also complete a company registration form.**

Disclaimer - Qorporate Services does not provide accounting, financial, legal or stamp duty advice. We do not take responsibility for your legal, taxation or other liabilities which may arise from the work we complete from your instructions. We advise you to first obtain legal and accounting advice in relation to your affairs and this transaction.