

Discretionary Trust Change of Trustee

Outlined below is a checklist of the information needed to complete a Discretionary Trust Change of Trustee order.

Please note that our Change of Trustee document takes the logic of “removing” all existing/exiting trustees and “re-appointing” them alongside any new trustees.

Trust Details

- Name of the discretionary trust

Variation Details

- Date of Establishment of Discretionary Trust
- Add date of variation? (i.e. if there have been prior variations to the deed, please provide the dates that these variations were executed)
- Who has the power to appoint a new trustee? The trustee; or other
- Appointment Clause Number
- Resignation Clause Number

Existing Trustee Details

If the Existing Trustee/s are individuals:

- Full name/s and address/es
- Action type: Continuing as a Trustee; Exiting as a Trustee

If the Existing Trustee is a company:

- Name of the company, ACN and registered address of the company
- Full name of Director/s

Continuing and New Trustee Details

If the Continuing and New Trustee/s are individuals:

- Full name/s and address/es

If the Continuing/New Trustee is a company:

- Name of the company, ACN and registered address of the company
- Full name of Director/s

Should you have any queries regarding this checklist, please refer to our Help Centre articles or contact the Support Team.