

Discretionary Trust Change of Appointor

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

Note that the Change of Appointor document takes the logic of “removing” all existing/continuing appointors/principals and “re-appointing” them along with any new appointors/principals.

Trust Details

- Name of the trust
- Jurisdiction

Variation Details

- Date of Establishment of Discretionary Trust
- Add date of variation? (i.e. if there have been any prior variations to the trust deed, please provide the dates on which the variations were executed)
- Exiting party i.e. Appointor, Guardian or Principal of the trust who wishes to retire from that role and has power under the trust deed to appoint a replacement

Trustee Details

If the Trust has individual trustee/s:

- Full name of each individual trustee
- Address of each individual trustee

If the Trust has a corporate trustee:

- Name of the company
- ACN of the company
- Registered address of the Company
- Full name/address of director/s of the trustee company

Existing Appointor/Principal/Guardian

- Full name/address
- Action type: Continuing as Principal; Exiting as Principal

New Appointor/Principal/Guardian

Note, please do not remove the details of any continuing Principal/s that have been pre-populated into this tab.

- Full name/address of new Principal

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