

Discretionary Trust Establishment

(Capital Reserved Lineal Descendant)

Outlined below is a checklist of the information needed to complete a Discretionary Trust Capital Reserved Lineal Descendant order.

Trust Details

- Name of the Trust
- Jurisdiction of the Trust
- Name/Address of Settlor
- Settlement sum

Appointor Details (If applicable)

Note, if no appointor is added, the Trustee is the Appointor with the powers of the Appointor to appoint Successor Appointors.

- Full name/address of Appointor/s
- Full name/address of Successor Appointor/s

Trustee Details

If the Trust has individual trustee/s:

- Full name/s
- Address/es

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

Primary Beneficiary Details

- Full name of each Primary Beneficiary
- Address of each Primary Beneficiary

Exclusion of Foreign Beneficiaries

- Do you wish to exclude foreign persons as beneficiaries of the Trust?

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