

## INFORMATION REQUIRED FOR SETTLEMENT OF A TRUST

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1) Type of Trust: Discretionary Trust or Unit Trust

2) Name of Trust:

3) Settlor Name and Address

4) Date of settlement

5) Settlement sum

6) Details of Trustee

Name of Trustee/s (if company, provide Australian Company Number)

Address of Trustee/s

7) Principle activity/ies of Trust

8) If Discretionary Trust

a. full name of father/mother or Appointor:

b. default beneficiary

If Unit Trust

Details of Unitholders/Unitholding (attached details if more than one unitholder)

**Unitholder No. 1 (if company, provide Australian Company Number)**

- Full name
- Residential address:
- Date of Birth (town & state, country)
- Australian Tax File No. (if any)
- Unitholding:
- Type of unit (eg. ordinary/management/income)