

Unit (Fixed) Trust – Instruction Sheet

We will prepare a standard unit trust deed and email the documents to you to arrange execution. Additional charges will apply if you wish for us to provide you with a hard copy of the documents.

In order for us to prepare an appropriate discretionary trust deed for you, please provide us with the information requested below.

1. Your full details

Name: _____

Address: _____

Telephone Number: _____ **Email:** _____

2. Name of Trust

3. Trustee(s) – Individual(s) or Corporate

Please tick the appropriate box

- Individual(s) (please go to Question 6)
- Corporate (please go to Question 7)

4. Individual Trustee(s) (complete this section and then go to Question 8)

Full Name: _____

Address: _____

5. Corporate Trustee (Advise us if you wish to establish this company)

Name of Company: _____

ACN: _____

Director(s) name & address: _____

Secretary: _____

Registered Office: _____

6. Unit Holders (Refer to Note 3)

Name (Include full names, addresses and ACN's if applicable. Please provide full details of trust or superannuation fund if holding units as a trustee).

No. of Units

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

There is no requirement to have unit trust deeds endorsed or stamped under the *Duties Act* 2008 (WA) which applies from 1 July 2008.

These notes are for client information purposes only and do not constitute legal advice. Legal advice may be obtained from Perth Probate and may be the subject of separate charges.