

OUR REF: **DISCRETIONARY TRUST INSTRUCTION SHEET**

YOUR REF:

Name of Trust:

.....

Full name(s) of Trustee(s):

.....

*(Company Name and ACN – if applicable)*

Address:

.....

Full name of Settlor:

.....

Beneficiaries:

.....

*(Principal Beneficiaries)*

Additional Options:

Parents: .....

Children & Remoter Issue: .....

Brothers & Sisters: .....

Designated "bucket company": .....

Other associates trusts & companies: .....

.....

Appointor(s):

.....

Is the Trust intended to take an exempt transfer of farming land? (Yes or No) .....

Is the Trust intended to be used for the carrying on of a business and the distribution of income to a Company? (Yes or No) .....

BRANCH OFFICES AT ROBE, PENOLA, BORDERTOWN, KEITH & KINGSTON

PRACTISING IN SOUTH AUSTRALIAN & VICTORIAN CONVEYANCING, WILLS, POWERS OF ATTORNEY & GUARDIANSHIP, DECEASED ESTATES, COMMERCIAL & RURAL LEASES, CORPORATE & TAX LAW, ESTATE & BUSINESS PLANNING, LIQUOR LICENSING, SUBDIVISIONS & PERSONAL INJURY CLAIMS