

INSTRUCTION SHEET FOR UNIT TRUST MODULE

Delivery Instructions

□	Please email documents to:

□	Please send completed documents to the following address:

Payment Instructions

\$550 by post or \$440 by email	
□	Please send me an account

□	Please charge my credit card
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Credit Card	<input type="checkbox"/> Bankcard <input type="checkbox"/> Visa <input type="checkbox"/> Mastercard
<i>(We are unable to accept American Express or Diners)</i>	
Card No.	
Expiry Date	_____ / _____
Credit Card CCV No.	_____
<i>(Last 3 digits after card no. on front / reverse of card – we cannot process your payment without this number)</i>	
Name on Card	
Amount	\$ _____
Cardholder's Signature	
<i>Where you pay our account by credit card, a surcharge equal to the amount of the merchant's fee may be added and you agree to pay such surcharge.</i>	

Please print clearly

Name of the Settlor

The Settlor can not be a beneficiary of the trust.

The Settlor should ideally be a family friend.

The Settlor is required to make a gift of \$20.00, sign the deed and has no further involvement in the trust.

Name of the Settlor

Address of the Settlor

Name of the Trustee

ACN of the Trustee

ACN

Address of the Trustee

Name of First Director/Sole Director of Trustee

Name of all other Directors of Trustee

Residential Address of First/Sole Director of Trustee

Name of the Trust

The

Unit Trust

Name of First Unitholder (include ACN and name of trust if applicable)

Address of First Unitholder

Name of First Director/Sole Director of First Unitholder

Name of all other Directors of First Unitholder

Name of all other Directors of First Unitholder

Name of Second Unitholder (include ACN and name of trust if applicable)

Address of Second Unitholder

Name of First Director/Sole Director of Second Unitholder

Name of all other Directors of Second Unitholder