

**INSTRUCTION SHEET TO ESTABLISH A HYBRID DISCRETIONARY TRUST**

**Delivery Instructions**

	<b>Please email documents to:</b>

	<b>Please send completed documents to the following address:</b>

**Payment Instructions**

<b>\$550 by post or \$440 by email</b>	
	Please send me an account

	Please charge my credit card
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<b>Credit Card</b>	<input type="checkbox"/> <b>Bankcard</b> <input type="checkbox"/> <b>Visa</b> <input type="checkbox"/> <b>Mastercard</b>
<i>(We are unable to accept American Express or Diners)</i>	
<b>Card No.</b>	
<b>Expiry Date</b>	_____ / _____
<b>Credit Card CCV No.</b>	_____
<i>(Last 3 digits after card no. on front / reverse of card – we cannot process your payment without this number)</i>	
<b>Name on Card</b>	
<b>Amount</b>	<b>\$</b>
<b>Cardholder's Signature</b>	
<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 \$10.00, sign the deed and has no further involvement in the trust.

**Address of the Settlor**

**Name of the Trustee**

**ACN of the Trustee**

**ACN**

**Address of the Trustee**

**Name of the Trust**

**The**  **Trust**

**Name of the Appointor**

The Appointor has ultimate control (namely, can appoint and discharge the Trustee).  
Depending on the individual circumstances of the client, the Appointor can be a single person or two or more persons jointly (e.g.: husband and wife).

**Name of the Principal Beneficiaries**

The deed provides that the beneficiaries include such persons as are related to the Principal Beneficiary as follows:

The spouse, children and remote descendants of such children, brothers, sisters, parents, children and remote descendants of such brothers and sisters, spouses of any of the foregoing and companies and trusts associated with all the persons named.

Generally, the Principal Beneficiary would be the husband, the wife or both the husband and wife. The latter is recommended where there are children of previous marriages.

**If the trustee is a company:****Name of First Director/Sole Director****Name of all other Directors****Residential Address of First/Sole Director****Details for the allotment of units****Name of Unitholder****Address of Unitholder****No. of units to be issued**