|  |  |
| --- | --- |
| ACN 079 220 901  [admin@banksiacorporate.com.au](mailto:admin@banksiacorporate.com.au)  [www.banksiacorporate.com.au](http://www.banksiacorporate.com.au) Phone (03) 9734 6780  **Order Form – DISCRETIONARY TRUST DEED – 2025/26** |  |

# Your Details

|  |  |
| --- | --- |
| Your Firm |  |
| Your Name |  |
| Delivery Address |  |
| Date |  |
| Phone Number |  |
| Email Address |  |
|  |  |
| Option 1 – Deed in Triplicate (Hardcopy) $280 Y/N? |  |
| Option 2 – Electronic Deed Only $240 Y/N? |  |
| Stamping of Deed – (Vic Only) $200 Y/N? |  |
| Indexed Binder $66 Y/N? |  |
| Additional Deed (Hard Copy) $22 Y/N? |  |
| Additional Deed (Soft Copy) $22 Y/N? |  |

# Trust Details

|  |  |
| --- | --- |
| Name of Trust |  |
| Laws of Which State/Territory Apply to This Document? |  |
| Settlor’s Name |  |
| Settlor’s Address |  |
| Settled Sum |  |
| Trustee’s Name |  |
| Trustee’s A.C.N. (If Applicable) |  |
| Trustee’s Address |  |

# 

# Beneficiaries

| Foreign beneficiaries to be included? Y/N? |  |
| --- | --- |
| Are both parents (first & second beneficiary) to be the parents of the children that are to be beneficiaries? Saying yes will exclude stepchildren and children from former/subsequent relations. Y/N? |  |
|  | |
| Full Name |  |
| Residential Address |  |

| **Full Name** |  |
| --- | --- |
| **Residential Address** |  |

| **Full Name** |  |
| --- | --- |
| **Residential Address** |  |

| **Full Name** |  |
| --- | --- |
| **Residential Address** |  |

| **Full Name** |  |
| --- | --- |
| **Residential Address** |  |

| **Full Name** |  |
| --- | --- |
| **Residential Address** |  |
| **1/2** | |

# Appointors

|  |  |
| --- | --- |
| **Full Name (1st Appointor)** |  |
| **Full Name (2nd Appointor) (if applicable)** |  |
| **Option 1 – The 1st appointor only during his/her lifetime or any person whom he/she may by Deed or Will appoint and failing appointment his/her legal personal representative. Y/N?** |  |
| **Option 2 - The 1st appointor during his/her lifetime and upon his/her death the 2nd appointor and upon the death of the survivor such person as the survivor may be Deed of Will appoint and failing such appointment, the survivor’s legal personal representative. Y/N?** |  |
| **Option 3 – The 1st and 2nd appointors jointly during their lifetimes and after the death of one of them the survivor and after the death of the survivor such person as the survivor may be Deed or Will appoint and failing such appointment his/her personal representative. Y/N?** |  |
|  | |
| Guardians - Optional | |
| **Full Name (1st Guardian)** |  |
| **Full Name (2nd Guardian)** |  |
| **Option 1 – The 1st guardian only during his/her lifetime or any person whom he/she may by Deed or Will appoint and failing appointment his/her legal personal representative. Y/N?** |  |
| **Option 2 - The 1st guardian during his/her lifetime and upon his/her death the 2nd appointor and upon the death of the survivor such person as the survivor may be Deed of Will appoint and failing such appointment, the survivor’s legal personal representative. Y/N?** |  |
| **Option 3 – The 1st and 2nd guardians jointly during their lifetimes and after the death of one of them the survivor and after the death of the survivor such person as the survivor may be Deed or Will appoint and failing such appointment his/her personal representative. Y/N?** |  |
|  | |
| Credit Card Payment | |
| **Cardholder’s Name** |  |
| **Credit Card No.** |  |
| **Expiry Date** |  |
| **Amount** |  |
| **Cardholder’s Signature** |  |

# 2/2