Bare Trust - Client Data Capture Form

General Info

|  |  |
| --- | --- |
| Name of the Trust |  |
| Date the Trust will be executed |  |

Trustee: Individual

|  |  |
| --- | --- |
| Full Name |  |
| Full Address |  |

Trustee: Company

|  |  |
| --- | --- |
| Name of the Company (including legal elements, i.e. Pty Ltd) |  |
| Full Address |  |
| Director/s Names |  |
| ACN |  |

Beneficiary: Individual

|  |  |
| --- | --- |
| Full Name |  |
| Full Address |  |

Beneficiary: Company

|  |  |
| --- | --- |
| Name of the Company (including legal elements, i.e. Pty Ltd) |  |
| Full Address |  |
| Director/s Names |  |
| ACN |  |

Beneficiary: Trust

|  |  |  |
| --- | --- | --- |
| Name of the Trust |  | |
| Individual Trustee | Name |  |
| Full Address |  |
| Company Trustee | Name of the Company (including legal elements, i.e. Pty Ltd) |  |
| Full Address |  |
| Director/s |  |
| ACN |  |

Beneficiary: SMSF

|  |  |  |
| --- | --- | --- |
| Name of the Fund |  | |
| Individual Trustee | Name |  |
| Full Address |  |
| Company Trustee | Name of the Company (including legal elements, i.e. Pty Ltd) |  |
| Full Address |  |
| Director/s |  |
| ACN |  |

Asset

|  |  |
| --- | --- |
| Cash (Amount of Cash) |  |
| Property (Property Address) |  |
| Other Asset (Example: 3000 shares of BHP and/or 1 BMW 216) |  |