Standard Discretionary Trust - Client Data Capture Form

General Info

|  |  |
| --- | --- |
| Name of the Trust |  |
| Date the Trust will be executed |  |
| State/Territory of governance |  |
| In the wind up of the trust, where there is no Beneficiaries which Charity should be supported? (N/A if none) |  |

Settlor: Individual

|  |  |
| --- | --- |
| Full Name |  |
| Full Address |  |
| Settlement Amount ($) |  |

Settlor: Company

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

Trustee: Individual

|  |  |
| --- | --- |
| Full Name |  |
| Full Address |  |
| Settlement Amount ($) |  |

Trustee: Company

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

Settlor: Individual

|  |  |
| --- | --- |
| Full Name |  |
| Full Address |  |
| Settlement Amount ($) |  |

Settlor: Company

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