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## INSTRUCTION SHEET FOR DISCRETIONARY TRUST

### 1. SETTLOR

Please provide full name, address and occupation:

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### 2. TRUSTEE

Please provide full name, address and occupation or registered company name, ACN and registered office:

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### 3. DIRECTORS OF TRUSTEE

Please provide full name, address of the Directors of the Trustee Company.

1. 

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2. 

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### 4. SETTLED SUM

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### 5. PRIMARY BENEFICIARIES

Please provide full name, address and occupation (usually only the children):

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**OR**

The children of the marriage of

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### 6. ADDITIONAL BENEFICIARIES

If not already stated please provide full name, address and occupation:

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### 7. VESTING DATE (if not 80 years)

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### 8. GUARDIAN AND APPOINTOR

If not Trustees, please provide full name address and occupation:

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and upon his/her/their death

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### 9. NAME OF TRUST

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### 10. DATE SETTLED

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