

On completion of this form, please send to O'Loughlins Lawyers.

Attention: Angela Rossi
Via Post: GPO Box 2410
Adelaide SA 5001

Or Fax: (08) 8111 4099

Requesting Party

Title: _____ First Name: _____ Surname: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

Email Address: _____ Telephone: _____ Fax: _____

Date documents required: _____

Trust Details

Name of Trust: _____

Governing Law: SA | VIC | NSW | QLD | WA | TAS | NT | ACT (please circle)

Settlor

Title: _____ First Name: _____ Surname: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

Settled Sum: _____ Settlement Date: _____

Trustees

Trustee 1

First Name: _____ Surname: _____
(or Company Name) (or ACN)

Address: _____

Suburb: _____ State: _____ Postcode: _____

If the Trustee is a corporation, please complete the following information.

Directors Name(s): _____

Trustee 2

First Name: _____ Surname: _____
(or Company Name) (or ACN)

Address: _____

Suburb: _____ State: _____ Postcode: _____

If the Trustee is a corporation, please complete the following information.

Directors Name(s): _____

Trustee 3

First Name: _____ Surname: _____
(or Company Name) (or ACN)

Address: _____

Suburb: _____ State: _____ Postcode: _____

If the Trustee is a corporation, please complete the following information.

Directors Name(s): _____

Beneficiaries

Primary Beneficiary 1

First Name: _____ Surname: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

If there are any excluded beneficiaries, please complete the following.

Name(s) of excluded beneficiaries: _____

Primary Beneficiary 2

First Name: _____ Surname: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

If there are any excluded beneficiaries, please complete the following.

Name(s) of excluded beneficiaries: _____

Appointors

Appointor 1

First Name: _____ Surname: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

Appointor 2

First Name: _____ Surname: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____