

Family Trust Checklist

☐ FAMILY TRUST

Name of Trust The word "Trust" will be included in the name	TheTrust
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☐ APPOINTOR/S AND GUARDIAN/S

Full Name or Company Name & ACN	Address (No. Street Name, Suburb, Postcode, Country)

☐ BACK-UP APPOINTOR/S AND GUARDIAN/S

Full Name (or the children of Mr ... and Mrs ...)	Address (No. Street Name, Suburb, Postcode, Country)

☐ TRUSTEE/S

Full Name or Company Name & ACN	Address (No. Street Name, Suburb, Postcode, Country)

☐ SPECIFIED BENEFICIARIES

Full Name (or the children of Mr ... and Mrs ...)	Address (No. Street Name, Suburb, Postcode, Country)

☐ FOREIGN PERSONS

Exclude from the Trust? Yes/No	
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☐ SETTLOR

Full Name	Address (No. Street Name, Suburb, Postcode, Country)