

**PLEASE NOTE:**

To have a valid Trust you can **NOT** have a sole Individual Trustee who is also the sole Unitholder.  
Eg. James Paul Smith cannot be a sole Trustee and sole Unitholder.

If you require further information please speak to one of our specialist solicitors on (07) 3230 5222.

**General Details of Unit Trust**

Date of Unit Trust Deed:

\_\_\_\_\_ *The date should be the day on which both the Trustee and the Unitholders sign the Trust Deed*

Name of Unit Trust:

\_\_\_\_\_ *Unlike choosing a Company name, there is no prohibition on the name chosen for a Unit Trust. It should be kept in mind however that you will need to cite the name of the Trust in all transactions. It is not necessary to include "the" at the start of the name, but include the word "Trust" at the end*

Price of Each Unit:

\_\_\_\_\_ *In most circumstances, the Trustee of the Unit Trust will issue units for one dollar (\$1.00)*

State of Applicable Law:

\_\_\_\_\_ **QLD      NSW      VIC      ACT      SA      WA      NT**  
*Please circle the relevant option*

Name and Address of Client:

\_\_\_\_\_ *The details of the person(s) to whom the Trust Deed will be sent for signing should be inserted here as if they were to appear on the top of the letter*

Salutation:

\_\_\_\_\_ *For the letter, it is only necessary to type the name/s. The word "Dear" is already in the document*

**If the Trustee is a Company**

Name and ACN:

\_\_\_\_\_ *Including ACN for example YOUR COMPANY PTY LTD ACN 000 000 000*

**If the Trustee(s) are individual(s), there must be at least two and no more than four individuals**

Name of First Trustee:

\_\_\_\_\_ *Whenever an individual is to be referred to in the Trust Deed their full names should be used (including any middle names)*

Name of Second Trustee:

\_\_\_\_\_

Name of Third Trustee:

\_\_\_\_\_

Name of Fourth Trustee:

\_\_\_\_\_

**UNITHOLDER DETAILS**

Maximum of fifteen Corporate or Individual Unitholders. For further Unitholders, copy this page and attach as Annexure A

**Corporate Unitholder(s) Details** (include Corporate Unitholders that will hold units as Trustees)*Corporate Unitholder #1*

Name and ACN:

For example, if the Company is acting as Trustee type Company Name, ACN and Trust name eg COMPANY PTY LTD ACN 123 456 789 AS TRUSTEE OF THE SMITH TRUST. If the Company is holding units in its own right simply type Company Name and ACN eg COMPANY PTY LTD ACN 123 456 789

Address:

This must be the Company's registered office

Number of Units  
subscribed to:

In most circumstances, it would be appropriate that each Unitholder is issued ten (10) units

Distinctive Numbers of the  
Units From and To:

Where the First Unitholder has been issued ten (10) units, those units would be numbered 1-10. A Second Unitholder who has been issued ten (10) units would have their units numbered 11-20.

Certificate Number of Units:

Where the First Unitholder has been issued ten (10) units, the unit certificate would be number 1. A second unitholder who has been issued ten (10) units would have their unit certificate numbered 2

**Individual Unitholder(s) Details** (include Individual Unitholders that will hold units as Trustees)*Individual Unitholder #1*

Name:

If an the Individual is acting as Trustee, write their full name and the Trust Name - eg FRED SMITH AS TRUSTEE OF THE SMITH TRUST. If more than one Individual acting as Trustee of the Trust, write both names in full and the Trust Name eg FRED SMITH AND PETER SMITH AS TRUSTEE OF THE SMITH TRUST. If the Individual is holding units in its own right, simply write their full name - eg FRED SMITH

Address:

Number of Units  
subscribed to:Distinctive Numbers of the  
Units From and To:

Certificate Number of Units:

**SPECIAL UNITHOLDER DETAILS (if applicable)**

*Special Units can be issued to allow the Trustee to make discretionary distributions to those holders of units with the consent of the Ordinary Unitholders. Maximum of ten Corporate or Individual Special Unitholders. For further Special Unitholders, copy this page and attach as Annexure B*

**Corporate Special Unitholder(s) Details** (include Corporate Unitholders that will hold units as trustees)

*Corporate Special Unitholder #1*

Name and ACN: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_

Certificate Number of Units: \_\_\_\_\_

**Individual Special Unitholder(s) Details** (include Individual Unitholders that will hold units as Trustees)

*Individual Special Unitholder #1*

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units subscribed to: \_\_\_\_\_

Distinctive Numbers of the Units From and To: \_\_\_\_\_

Certificate Number of Units: \_\_\_\_\_

**PAYMENT FORM**

Please forward these details together with the completed instruction sheet

**CONTACT NAME:** .....

**FIRM NAME:** .....

**TELEPHONE NO:** ..... **FAX NO:** .....

**DELIVERY ADDRESS:** .....

.....

.....

**DELIVERY EMAIL:** .....

---

**Credit Card Payment**

Card Type (*please circle*):    Mastercard    Visa

Card No.: .....

Expiry Date:         / .....

Amount: \$450.00 .....

Name of Cardholder: .....

Signature: .....

Once complete email instruction sheet and payment details to the Legal Resource Club – Fax 07 3252 1355 or Email [clearlaw@clearhoare.com.au](mailto:clearlaw@clearhoare.com.au)