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# Instructions for a Sub-Trust Investment Agreement

## Your details

Name

Date

Organisation

ACN/ABN

Delivery

Address

Phone

Email

## Agreement details

This Agreement is prepared in order to comply with the requirements of PS LA 2010/4.

- **Trust Details** – Name of Trust, please email a copy of the Trust Deed to us so that we can check it has the appropriate sub-trust clause.
- **Trustee details** – name, ACN, address
- **Details of entity to whom UPE is owed** – full name, address
- **Loan Amount**
- **Loan Date**
- **Principal Repayment date**

## Logo

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- No - we will include our logo

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