



documentshop

Instructions for establishing a Unit Trust

Your details

Name

Date

Organisation

ACN/ABN

Delivery
Address

Phone

Email

Your Ref No.

Delivery options

(please tick the appropriate box)

☐ DIY Print - Please deliver all documents to me via e-mail **\$418***

☐ Hard copy - Please print, bind and deliver all documents to me in a binder via courier **\$495***

***Prices are GST inclusive. Prices do not include any stamp duty that may be payable.**

Name of trust

Trust purpose

What will the Trust be used for?

Trustee(s) details

(Individual(s) or Corporate Trustee)

☐ **Individuals** Full Name/s:

Address/es:

☐ **Company** Name:

ACN:

Registered Office Address:

Name of each director:

Meeting Address

Initial Unit Holder details

Full Name & Street Address	If Unit Holder is: • A company- ACN & full names of directors • A trustee of a trust- name of trust	Number of initial units	Unit type (e.g. ordinary)	Value of initial units per unit	Total \$ paid per unit
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Which jurisdiction's laws will apply to the Trust?

[State or Territory]

Stamping

The Trust deed may be required to be stamped in the relevant jurisdiction. Please advise if you require our assistance with this process and we can provide you with a quote to do so.

Logo

Would you like us to include your logo on the documents?

☐ Yes - please e-mail to us your logo for insertion

☐ No - we will include the Document Shop logo

Other requirements

(if any)

Identity verification

As part of our obligations as a professional services provider under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* (AML/CTF Act) we are required to gather certain information to ensure compliance with anti-money laundering and counter-terrorism financing obligations.

Please provide the following information by email to info@documentshop.com.au:

- Please provide a copy of photographic ID (eg drivers licence or passport) for each Trustee and Unit Holder.

Acceptance of terms and conditions

☐ By ticking this box, I/we acknowledge that I/we have read and agree to the Document Shop Pty Ltd *terms and conditions and acknowledgement* [available on our website at www.documentshop.com.au or contact us at info@documentshop.com.au and we will e-mail or post a copy to you].

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