

Family Trust Checklist

FAMILY TRUST

| | |
|--|------------------------|
| <p style="text-align: center;">Name of Trust</p> <p>The word "Trust" will be included in the name</p> | <p>The Trust</p> |
|--|------------------------|

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 Company Name & ACN | Address (No. Street Name, Suburb, Postcode, Country) |
|---------------------------------|---|
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| | |

TRUSTEE/S

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

FOREIGN PERSONS

| | |
|---|--|
| Exclude from the Trust? Yes/No | |
| Exclusion Irrevocable? Yes/No | |

SPECIFIED BENEFICIARIES

| | |
|------------------|--|
| Full Name | |

SETTLOR

| Full Name (& Firm Name, if applicable) | Address (No. Street Name, Suburb, Postcode, Country) |
|---|---|
| | |

JURISDICTION

| | |
|-------------------|-------------------------------------|
| Choose one | ACT NSW NT QLD SA TAS VIC WA |
|-------------------|-------------------------------------|