

Family Trust Checklist

☐ **FAMILY TRUST**

Name of Trust The word "Trust" will be included in the name	The Trust
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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 Company Name & ACN	Address (No. Street Name, Suburb, Postcode, Country)

☐ **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	
Full Name	
Full Name	
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
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