

Family Trust Update to Allow Sole Trustee Checklist

FAMILY TRUST

Name of Trust	
Which State/Territory is the Trust based in?	
Date Original Deed was signed?	
Date of 1 st Trust Deed Update	
Date of 2 nd Trust Deed Update	
Date of 3 rd Trust Deed Update	
Date of 4 th Trust Deed Update	

SETTLOR

Full Name	
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GUARDIAN/S

Full Name	Address (No. Street Name, Suburb, Postcode, Country)

APPOINTOR/S

Full Name	Address (No. Street Name, Suburb, Postcode, Country)

TRUSTEE/S

Full Name OR Company Name & ACN	Address (No. Street Name, Suburb, Postcode, Country)

TRUST DEED DETAILS

Clause number of Trust Deed giving the Trustee power to vary the Trust Deed?	
Guardian's consent required? Yes/No	
Appointor's consent required? Yes/No	
Clause number of Trust Deed expressly requiring 2 or more Trustees (or alternatively, a corporate Trustee)?	
Total number of clauses in Trust Deed?	