

## 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 <sup>st</sup> Trust Deed Update	
Date of 2 <sup>nd</sup> Trust Deed Update	
Date of 3 <sup>rd</sup> Trust Deed Update	
Date of 4 <sup>th</sup> Trust Deed Update	

☐ SETTLOR

Full Name	
-----------	--

☐ 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?	