INTERVIEW AND DATA CAPTURE

BARE TRUST

Prepared for:

1. **BARE TRUST**

|  |  |
| --- | --- |
| **Name of Trust** |  |
| **Approximate Date of Establishment** |  |

1. **TRUSTEE DETAILS**

**Individual Trustee**

|  |  |
| --- | --- |
| **NAME OF TRUSTEE** |  |
|  |
|  |
| **ADDRESSES OF TRUSTEE** |  |
|  |
|  |

**Corporate Trustee**

|  |  |
| --- | --- |
| **NAME OF TRUSTEE** |  |
| **ACN** |  |
| **REGISTERED OFFICE** |  |
| **DIRECTORS** |  |
|  |
|  |

1. **BENEFICIARY DETAILS**

**Individual Beneficiary**

|  |  |
| --- | --- |
| **NAME OF BENEFICIARY** |  |
|  |
|  |
| **ADDRESSES OF BENEFICIARY** |  |
|  |
|  |

**Corporate Beneficiary**

|  |  |
| --- | --- |
| **NAME OF BENEFICIARY** |  |
| **ACN** |  |
| **REGISTERED OFFICE** |  |
| **DIRECTORS** |  |
|  |
|  |

**Trust Beneficiary**

|  |  |
| --- | --- |
| **NAME OF TRUST** |  |
| **NAME OF INDIVIDUAL TRUSTEE** |  |
| **FULL ADDRESS** |  |

|  |  |
| --- | --- |
| **NAME OF TRUST** |  |
| **NAME OF CORP TRUSTEE** |  |
| **ACN** |  |
| **REGISTERED OFFICE** |  |
| **DIRECTORS** |  |
|  |
|  |

**SMSF Beneficiary**

|  |  |
| --- | --- |
| **NAME OF SMSF** |  |
| **NAME OF INDIVIDUAL TRUSTEE** |  |
| **FULL ADDRESS** |  |

|  |  |
| --- | --- |
| **NAME OF SMSF** |  |
| **NAME OF CORP TRUSTEE** |  |
| **ACN** |  |
| **REGISTERED OFFICE** |  |
| **DIRECTORS** |  |
|  |
|  |

1. **ASSET DETAILS**

|  |  |
| --- | --- |
| **CASH (AMOUNT)** |  |
| **PROPERTY (ADDRESS)** |  |
| **OTHER ASSET (example: 3000 shares of bhp and/or 1 bmw 216)** |  |
|  |
|  |
|  |