INTERVIEW AND DATA CAPTURE

DISCRETIONARY TRUST DEED

Prepared for:

Dated:

1. **TRUSTS**

|  |  |
| --- | --- |
| **Name of Trust** |  |
| **Appointor with address** |  |
| **Settlor with address** |  |

1. **TRUSTEE DETAILS**

**Individual Trustee**

|  |  |
| --- | --- |
| **Name of Trustee** | **Address of Trustee** |
|  |  |
|  |  |
|  |  |
|  |  |

**Corporate Trustee**

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

1. **SUCCESSOR APPOINTOR DETAILS**

|  |  |
| --- | --- |
| **Name of Successor Appointors of the Trust** | **Address of the Successor Appointor** |
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|  |  |
|  |  |

1. **PRIMARY BENEFICIARY DETAILS**

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| --- | --- |
| **Name of the Beneficiary** | **Address of the Beneficiary** |
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