INTERVIEW AND DATA CAPTURE

ESTABLISHMENT OF A FAMILY PROTECTION TRUST

Prepared for:

Dated:

1. **TRUSTS**

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| --- | --- |
| **Name of Trust** |  |
| **Jurisdiction (We recommend SA, as then the trust will not be bound by the rules of perpetuities and can continue for more than 80 years)**  |  |
| **Settlor (Name and Address)**  |  |

1. **TRUSTEE DETAILS**

**Individual Trustee**

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| --- | --- |
| **NAME OF TRUSTEE**  |  |
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|  |
| **ADDRESSES OF TRUSTEE** |  |
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**Corporate Trustee**

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

1. **FAMILY PROTECTION APPOINTOR DETAILS**

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| **FAMILY PROTECTION APPOINTORS OF THE TRUST WITH ADDRESSES**  |  |
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1. **SUCESSOR APPOINTOR DETAILS**

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| **SUCCESSOR FAMILY PROTECTION APPOINTORS OF THE TRUST WITH ADDRESSES**  |  |
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1. **EXCLUDED BENEFICIARY DETAILS**

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| **BENEFICIARIES YOU WANT TO EXLCUDE FROM THE TRUST** |  |
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