INTERVIEW AND DATA CAPTURE

TRUST VARIATION/UPGRADE

Prepared for:

1. **BARE TRUST**

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

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. **APPOINTOR DETAILS**

**Individual Appointor**

|  |  |
| --- | --- |
| **NAME OF APPOINTOR** |  |
|  |
|  |
| **ADDRESSES OF APPOINTOR** |  |
|  |
|  |

**Corporate Appointor**

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

1. **SUCCESSOR APPOINTOR DETAILS**

**Individual Appointor**

|  |  |
| --- | --- |
| **NAME OF APPOINTOR** |  |
|  |
|  |
| **ADDRESSES OF APPOINTOR** |  |
|  |
|  |

**Corporate Appointor**

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