INTERVIEW AND DATA CAPTURE

UNIT TRUST ESTABLISHMENT

Prepared for:

Dated:

To establish a new Unit Trust Deed we require the following details from you:

1. **TRUST**

|  |  |
| --- | --- |
| **Name of Trust** |  |

1. **TRUSTEE DETAILS**

**Corporate Trustee**

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

1. **UNITHOLDER DETAILS**

|  |  |  |
| --- | --- | --- |
| **UNITHOLDER NAME (with Address)** | **TRUSTEE (if applicable)** | **UNITS HELD (and cost per unit)**  |
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