Family Trust

≡*FastTrack*≡ Instruction Form

Adviser's Name: _____

Delivery Address: _____

_____

CIVIC LEGAL

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Instructions only accepted if form is completed by your Accountant/Adviser with <u>FULL PAYMENT</u>

1. Who controls the Trust? - The Appointor

Appointor(s) Full Name	First Name	Middle Name	Surname
Residential Address			

The Appointor (guardian) controls the Trustee and therefore controls the trust. The Appointor can sack the Trustee. The Appointor can also be the Trustee. You can appoint yourself and your spouse as the Appointor.

2. Who is the figure head? - The Trustee

Trustee(s) Full Name (and ACN Number if a company)	In NSW (only) the Trustee can't be a beneficiary. Therefore, in NSW consider making the Trustee a company or say your mum (provided you never want to distribute to that company or your mum).
Trustee Address	

The Trustee is the figure head of the Trust but takes its orders from the Appointor. The Trust assets are usually in the name of the Trustee. The Trustee can be a company or a person. You can be both the Trustee and Appointor.

3. What happens after the Appointor(s) dies?

The Appointor (after the first Appointor(s) dies)	

While you may **control** the Trust Assets you do not **own** them. Because the assets don't form part of your personal estate, it is important to work out who gets to control your Trust after you (and your spouse) die. Often, Mum and Dad are the Appointor and then the children. (If your clients are having more children, just put "My Children").

4. Who gets the income of the trust if you do nothing?

Specified Beneficiaries	

If you fail to make a distribution of income, you need to have some default person(s) to take the income. Usually, clients appoint their children.

5. What do you want to call your Family Trust?

The	Trust

Call your Trust anything you like. People often use their surname. *eg The Smith Family Trust*

6. Cost as at 6 April 2011: $330. This price only applies where this form is completed by an Accountant or Adviser. Changes to these instructions incur additional costs. Our lawyers are available to provide advice. The cost is $440 per hour. The Settlor of the Trust is a solicitor at our office. The settled sum is $10.

❑ **Charge my credit card**

Card Type	❑Visa ❑M/Card		
Card Number			
Name on Card		Expiry	/20

❑ or **Cheque enclosed**

❑ I would like the deeds delivered by courier. Usually $10 per delivery (most Perth metro areas)

Please fax to Civic Legal on 08 9460 5001, or post to or complete at our website:
Civic Legal, PO Box 7432, Cloisters Square, Perth, Western Australia 6850.