

# Unit Trust

## **FastTrack** Instruction Form

Adviser's Name: \_\_\_\_\_  
 Delivery Address: \_\_\_\_\_  
 \_\_\_\_\_



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**Instructions are only accepted if this form is completed by an Accountant or Adviser with FULL PAYMENT**

### 1. Who runs the Unit Trust? - The Trustee

Full Name of the Trustee (and ACN Number if a company)  Trustee Address	First Name	Middle Name	Surname

The Trust assets are in the name of the Trustee. The Trustee can be a company or a person. You and your business partner can be the Trustee.

### 2. What do you want to call your Unit Trust?

The .....Unit Trust

You can call the Trust anything you like. Many people call the trust after their own surname or business name. *eg - The Car Craft Unit Trust*

### 3. Who are the Unit Holders?

Full Name "as Trustee for the ... Trust" (if applicable)	Full Residential Address	No. of General Units (\$1.00 each)
1.		
2.		
3.		
4.		
5.		
6.		
Total Value of Units		\$

Each Unit Holder also gets one Discretionary Unit. One is all you need. Superannuation Funds cannot use the discretionary unit that the Unit Trust will give to them.

### 4. Cost as at 6 April 2011: \$550.

This price only applies where this form is completed by an Accountant, Adviser or Lawyer. Our lawyers are available to provide advice at \$440 per hour. For more help: [www.TaxLawyers.com.au](http://www.TaxLawyers.com.au)

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or **Cheque enclosed**

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

Please take care when completing this instruction form. Changes incur additional costs.