**TRUST AMENDMENT ORDER FORM**

**Person ordering**

|  |  |  |
| --- | --- | --- |
| Name: | |  |
| Firm Name: | | Member number: |
| Phone: |  | Email: |

**Section A: Amendment details**

Please select required products and provide credit card details for payment.

|  |  |  |
| --- | --- | --- |
| Change of Trustee | Renunciation of Beneficiary | Vesting |
| Change of Name | Exclusion of Beneficiary | Deed of Rectification |
| Change of Appointor/ Principal/Guardian | Nomination of Beneficiary | Change of Successor Appointor/Principal/Guardian |

**$350 for the first amendment, additional $220 for each additional change requested.**

All prices include GST and the documentation will be sent to the nominated email address in PDF format.

|  |
| --- |
| **Provide amendment details here:** |
|  |
|  |
|  |
|  |

If a deed of Renunciation/Exclusion of Beneficiary is being ordered, please advise whether the change is to be revocable or irrevocable.

**Section B: Payment details**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enclosed is payment for Trust amendment documentation for the sum of: **$** | | | | |
| On Account\* | Visa | Mastercard | | Amex |
| Card Holder Name: | | | | |
| Credit Card Number: | | | | |
| Expiry Date:       / | | | Authorised Card Signature: | |

Note that our staff will call you to request the CVV when payment is processed.

\*To pay on account you must have a current On Account Agreement with Docscentre.

**Please complete all details in legible handwriting and provide full legal names.**

**Return completed form, a complete copy of the signed trust deed and any subsequent amendment documentation to** [**info@docscentre.com.au**](mailto:info@docscentre.com.au)



**TRUST AMENDMENT ORDER FORM**

**Section C: Trust Details**

|  |  |  |  |
| --- | --- | --- | --- |
| Trust Name: | | |  |
| Date of original trust deed:       /       / | Date of last amendment: | | /       / |
| Does the Trust own dutiable property in NSW or ACT? | | Yes | No |

**Section D: Current Trustee Details**

|  |  |  |
| --- | --- | --- |
| Trustee Name: | | |
| ACN (if a company): | | |
| Officer name and Role: | Director | Secretary |
| Officer name and Role: | Director | Secretary |
| Officer name and Role: | Director | Secretary |
| Officer name and Role: | Director | Secretary |

**Section E: Current Appointor/Principal Details**

|  |  |  |
| --- | --- | --- |
| Full Name: |  |  |
| Full Name: |  |  |
| Full Name: |  |  |
| Full Name: |  |  |

**Section F: Current Unit holder details (if a Unit Trust)**

|  |  |  |
| --- | --- | --- |
| Unitholder 1. | | |
| Full Name: |  |  |
| Address: | | |
| Unitholder 2. | | |
| Full Name: |  |  |
| Address: |  |  |
| Unitholder 3. | | |
| Full Name: |  |  |
| Address: |  |  |



**TRUST AMENDMENT ORDER FORM**

**Section G: Change of Trustee/Appointor/Principal/Guardian**

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name: |  | | |
| ACN (if a company): | | | |
| Officer name and Role: | | Director | Secretary |
| Officer name and Role: | | Director | Secretary |
| Change of:  Trustee  Appointor  Principal  Guardian | | | |

Continue  Appoint  Remove  Resign  Other (e.g. Death, Bankruptcy, Incapacity)

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name: |  | | |
| ACN (if a company): | | | |
| Officer name and Role: | | Director | Secretary |
| Officer name and Role: | | Director | Secretary |
| Change of:  Trustee  Appointor  Principal  Guardian | | | |

Continue  Appoint  Remove  Resign  Other (e.g. Death, Bankruptcy, Incapacity)

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name: |  | | |
| ACN (if a company): | | | |
| Officer name and Role: | | Director | Secretary |
| Officer name and Role: | | Director | Secretary |
| Change of:  Trustee  Appointor  Principal  Guardian | | | |

Continue  Appoint  Remove  Resign  Other (e.g. Death, Bankruptcy, Incapacity)

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name: |  | | |
| ACN (if a company): | | | |
| Officer name and Role: | | Director | Secretary |
| Officer name and Role: | | Director | Secretary |
| Change of:  Trustee  Appointor  Principal  Guardian | | | |

Continue  Appoint  Remove  Resign  Other (e.g. Death, Bankruptcy, Incapacity)



**TRUST AMENDMENT ORDER FORM**

**Special Instructions/Additional information:**

|  |
| --- |
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| A picture containing application  Description automatically generated    Because it’s a jungle out there. Since 1983 |
| Logo  Description automatically generated  The Voice of the Tax Agent community. Since 1992 |
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