**Foreign Exclusion Variation –**

**Discretionary Trust**

**Person ordering**

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

**Payment details**

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

**Deed of Variation:**

Foreign exclusion (Deed prepared by Docscentre) **$440**

Foreign exclusion (Deed prepared by another supplier) from **$550**

|  |  |  |  |
| --- | --- | --- | --- |
| On Account\* | Visa | Mastercard | Amex |
| Card Holder Name: | | | |
| Credit Card Number: | | | |
| Expiry Date:       / | | Authorised Card Signature: | |

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

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.

**Section A: Trust details**

|  |  |
| --- | --- |
| Name of Trust: |  |
|  | |

|  |  |  |
| --- | --- | --- |
| Does the Trust own dutiable property in NSW or ACT? | Yes | No |

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

**Please return completed form, a scanned copy of the original trust deed, and any prior amendments to info@docscentre.com.au**

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**Discretionary Trust**

**Section B: Trustee Details:**

**Individual Trustees**

|  |
| --- |
| Trustee 1. Full Name: |
| Trustee 2. Full Name: |
| Trustee 3. Full Name: |
| Trustee 4. Full Name: |

**Corporate Trustee**

|  |  |
| --- | --- |
| Corporate Trustee Name: | ACN: |
| Address: | |
| Name of Director (1): | |
| Name of Director (2): | |
| Name of Director (3): | |
| Name of Director (4): | |
| Name of Secretary (if applicable): | |

**Section C: Appointor(s)**

|  |
| --- |
| **Appointor** **1** Name: |
| Residential Address: |
| **Appointor 2** Name: |
| Residential Address: |
| **Appointor 3** Name: |
| Residential Address: |
| **Appointor 4** Name: |
| Residential Address: |



**Foreign Exclusion Variation –**

**Discretionary Trust**

**Special instructions (if any)**

|  |
| --- |
|  |
|  |
|  |

**Scope of the package**

The Package will not address the provisions of the trust deed apart from inserting foreign person exclusions unless your special instructions include other requirements.

We will not consider:

* the financial position of the Trust, the Trustee or any other person connected to the Trust or any solvency issues regarding any of them or the appropriateness of the use of the Trust as an investment vehicle;
* the assets and liabilities of the Trust, particularly any licence including a liquor licence held by the Trust (noting that certain changes may require the consent of a relevant authority);
* the asset protection strategies of the Trustee or any other person connected to the Trust or whether or not the Package will alter or affect any asset protection strategies;
* the estate planning wishes of the Trustee or any other person connected to the Trust or whether or not the Package will alter or affect any person’s estate plan.

**Duty/Tax**

There may be tax, duty or other costs associated with the Package. We recommend that you contact the revenue office in the jurisdiction where dutiable assets are located, or which may have jurisdiction in relation to transactions involving the Trust to confirm any duty and other obligations and the required documentation to be lodged. You should seek professional legal advice from an appropriately qualified person regarding the possibility of tax or duty applying to these documents.

We do not provide any legal advice to the parties in relation to the suitability of the Package. In particular, we are not licensed to provide financial product advice under the Corporations Act 2001 (Cth) and you should consider taking advice from the holder of an Australian Financial Services Licence before making a decision on a financial product.

By completing this order form and returning to Docscentre you confirm that you have read and accepted our terms and

conditions which can be found here – [www.docscentre.com.au/terms-and-conditions/](http://www.docscentre.com.au/terms-and-conditions/)



**Our Partners and Brands**

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Docscentre manages the best documentation businesses, offering professionals a broad range of services across the country.

|  |
| --- |
| A picture containing icon  Description automatically generated  Legal documents you can trust. Since 2004 |
| 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 |
| A logo with a castle in the middle  Description automatically generated    Partnering with you to get it right. Since 1995 |

