

# PATRICIA HOLDINGS (QLD) PTY. LTD.

ABN 67 009 935 148

ACN 009 935 148

## SHELF COMPANY FORMATIONS COMPANY FORMATION SERVICES

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**Contact name & phone number:** \_\_\_\_\_

**Electronic version required:** YES / NO

**If yes, email address:** \_\_\_\_\_

### DISCRETIONARY TRUST ORDER FORM

Name of Discretionary Trust: \_\_\_\_\_

Date of Discretionary Trust: \_\_\_\_\_

Name of Settlor: \_\_\_\_\_

State of Applicable Law: (please circle) QLD NSW ACT WA SA NT VIC TAS

#### ***If the Trustee is a company:***

Name and ACN: \_\_\_\_\_

#### ***If the Trustee(s) are individuals:***

Full Name of First Trustee: \_\_\_\_\_

Full Name of Second Trustee: \_\_\_\_\_

Full Name of Third Trustee: \_\_\_\_\_

Full Name of Fourth Trustee: \_\_\_\_\_

Full Name(s) of Principal Beneficiaries: \_\_\_\_\_  
\_\_\_\_\_

#### ***If succession is to be controlled:***

Full Name of First Principal: \_\_\_\_\_

Full Name of Successor Principal: \_\_\_\_\_

#### ***If succession is not controlled:***

Full Name of Principal: \_\_\_\_\_

#### DEFINITIONS

**TRUSTEE** - A person (or corporation) to whom property is conveyed or bequeathed in trust for the benefit of the beneficiaries. The trustee has a duty to ensure that the terms of the trust are carried out, this includes prudently dealing with trust property and making proper distributions to the right amount to those beneficiaries who are entitled.

**BENEFICIARY** - A person (or corporation) who, by being in a particular kind of legal or equitable relationship (such as a child of a family group, receives a benefit e.g. a distribution of profits for the financial year.

**SETTLOR** - A person who creates a trust by manifesting a sufficiently certain intention that a trust was intended in favour of one or more beneficiaries.

**PRINCIPAL** - A person who has the power/capacity to control the trust e.g. can appoint the trustee or who can terminate the trusteeship.

**SUCCESSOR PRINCIPAL** - is someone to take over as Principal if the appointed Principal dies - so that they can control who takes over the trust if they pass on.