

## UNIT TRUST INSTRUCTION FORM

<b><u>Unit Trust Name</u></b>
The ..... Trust

<b><u>Trustee</u></b>
<small>(The Trustee can be one or more individuals or companies)</small>
Full Name: ..... (and ACN if a company)
Address: .....

<b><u>Unit Holders</u></b>
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<b>1</b>	Full Name: ..... (and ACN if a company) Address: ..... Number of Units: ..... Nominal Value of Units: \$.....
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<b>2</b>	Full Name: ..... (and ACN if a company) Address: ..... Number of Units: ..... Nominal Value of Units: \$.....
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<b>3</b>	Full Name: ..... (and ACN if a company) Address: ..... Number of Units: ..... Nominal Value of Units: \$.....
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<b><u>Quorum and Voting</u></b>
<small>(Default for a quorum is for Unit Holders holding at least 50% of voting Units / Default voting for a special resolution is a 75% majority)</small>
Quorum (if not default): ..... (default applies if left blank)
Special Resolution (if not default): ..... (default applies if left blank)

Our fees (from 1 July 2022) for establishing a family trust / discretionary trust are \$450 + GST + any disbursements, which includes a bound copy of the Trust Deed plus an electronic pdf copy of the Trust Deed (if requested). If you require more than one family trust, please speak to us as we may be able to offer you a discount.

Please speak to us if you need us to form a company for you to act as corporate trustee. Usual costs for forming a corporate trustee are \$950 + GST which includes a full company folder, ASIC forms, starter minutes and a Constitution.

Any changes to your requirements may incur extra costs. Please call us to discuss how we can best help you.

<b><u>Your Details</u></b>
Signed: ..... Date: ..... Full Name: ..... (ACN .....) Address: ..... Telephone: ..... (mobile) ..... (other e.g. work/home)

Please print, complete, and return this form by email or post to:

**Balfour Meagher Legal & Business Advisors**

PO Box 918, West Perth WA 6872

Telephone +61 8 9322 3842 | Email [admin@bmlegaladvisors.com.au](mailto:admin@bmlegaladvisors.com.au) | Web [www.bmlegaladvisors.com.au](http://www.bmlegaladvisors.com.au)