

CORPORATE TRUSTEE

Name:

ABN:

Australian Mailing Address:

DIRECTOR DETAILS				
Name	Date of Birth	TFN	Address	ID

SHAREHOLDING (OPTIONAL):	
Name	Shareholding %

TRUST DETAILS

Trust Name:

Date of Establishment:

Copy of the trust Deed?

Trust ABN:

TFN:

Nature of the Trust:

Australian Mailing Address:

Does the trust operate as a business?

GST/PAYGW Registered?

Does the trust own or have an interest in Australian Property?

Does the trust conduct any financial trading?

BENEFICIARY DETAILS

Name	Date of Birth	TFN	Address

List of assets and account statements to fund the trust (e.g., cash, securities, closely held, real estate, etc.)

Documents Required	
Trust Deed	
Copy of Recent Bank Statements	
Copy of Tax Return	
Copy of Financials	
ID for Each Director	
Director Identification Number	