



Level 1, 224 Rokeby Road Subiaco WA 6008
PO Box 1725 Subiaco WA 6904
Tel: (08) 9388 0551
Fax: (08) 9388 6551

Unit Trust Instructions

Name of Trust: State:.....

Note: The standard Deed allows the Trustee to issue **both** Ordinary Units and Special Income Units (discretionary income but no capital or voting rights)

Is a "Fixed" Trust Required?(only Ordinary Units can be issued/no Special Income Units permitted at any stage)Yes /No

TRUSTEE DETAILS

Name of Trustee:.....
A.C.N. or 2nd Trustee:.....
Address:.....
Suburb: State:..... Postcode:.....

UNIT HOLDERS DETAILS

Name of Unit holder:.....
A.C.N: No. Ord Units:.....
Address: No. Income Units:
Suburb:..... State:..... Postcode:.....

Name of Unit holder:
A.C.N: No. Ord Units:.....
Address: No. Income Units:
Suburb: State: Postcode:.....

Name of Unitholder:
A.C.N: No. Ord Units:.....
Address: No. Income Units:.....
Suburb:..... State:..... Postcode:

Number of Members and Units held for Quorum:

The standard Deed specifies at least 2 Members holding at least 40% of the voting Units

Yes /No - if no please specify.....

Number of Votes for Special Resolution:

The standard Deed specifies three quarter majority

Yes /No - if no please specify

Any other special requirements? Yes /No if yes please specify
(further costs may apply, we will contact you to discuss)

APPLICANT DETAILS

Applicants Name: Contact Person:
Address:
Suburb: State: Postcode:.....
Telephone: Facsimile:
Email Address:

Payment Details: \$231 or \$286 (with register) Chq Encl.

Direct Deposit (BSB: 124-001 Acct No.: 01048552)

or Charge our Credit Card: Bankcard Visa Mastercard

Card Number: Expiry Date:

Name of cardholder: Signature: