**Trust Amendment Order**

**Person ordering**

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

**Section A: Amendment details**

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

|  |  |  |
| --- | --- | --- |
| Change of Trustee | Vest/Terminate Trust | Changes to beneficiaries |
| Change of Trust Name | Deed of Rectification/Correction | Other (specify below) |
| Change of Appointor/ Principal/Guardian | Change of Successor Appointor/ Principal/Guardian |  |

**Please complete all sections if applicable.**

**$350 for the first amendment, plus $220 for each additional change requested.**

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

|  |
| --- |
| **Provide amendment details here:** |
|  |
|  |
|  |
|  |

**Section B: Payment details**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Please provide credit card details for payment of: | | | | **$** | |
| On Account\* | Visa | Mastercard | | | Amex |
| Card Holder Name: | | | | | |
| Credit Card Number: | | | | | |
| Expiry Date:       / | | | Authorised Card Signature: | | |

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.

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

**Return completed form, a complete copy of the signed trust deed and any subsequent amendment documentation to** [**info@docscentre.com.au**](mailto:info@docscentre.com.au)

**Trust Amendment Order**

**Section C: Trust Details**

|  |  |  |  |
| --- | --- | --- | --- |
| Trust Name: | | |  |
| Date of original trust deed:       /       / | | Date of last amendment: | /       / |
| Does the Trust own dutiable property in NSW or ACT? | Yes | No | |

**Section D: Current Trustee Details**

|  |  |  |
| --- | --- | --- |
| Trustee Name: | | |
| ACN (if a company): | | |
| Officer name and Role: | Director | Secretary |
| Officer name and Role: | Director | Secretary |
| Officer name and Role: | Director | Secretary |
| Officer name and Role: | Director | Secretary |

**Section E: Current Appointor/Principal Details**

|  |  |  |
| --- | --- | --- |
| Full Name: |  |  |
| Full Name: |  |  |
| Full Name: |  |  |
| Full Name: |  |  |

**Section F: Current Unit holder details (Only for Unit Trusts)**

|  |
| --- |
| Unitholder 1. Full Name: |
| Unitholder 2. Full Name: |
| Unitholder 3. Full Name: |



**Trust Amendment Order**

**Section G: Change of Trustee/Appointor/Principal/Guardian**

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name: |  | | |
| ACN (if a company): | | | |
| Officer name and Role: | | Director | Secretary |
| Officer name and Role: | | Director | Secretary |
| Change of:  Trustee  Appointor  Principal  Guardian | | | |

Continue  Appoint  Remove  Resign  Other (e.g. Death, Bankruptcy, Incapacity)

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name: |  | | |
| ACN (if a company): | | | |
| Officer name and Role: | | Director | Secretary |
| Officer name and Role: | | Director | Secretary |
| Change of:  Trustee  Appointor  Principal  Guardian | | | |

Continue  Appoint  Remove  Resign  Other (e.g. Death, Bankruptcy, Incapacity)

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name: |  | | |
| ACN (if a company): | | | |
| Officer name and Role: | | Director | Secretary |
| Officer name and Role: | | Director | Secretary |
| Change of:  Trustee  Appointor  Principal  Guardian | | | |

Continue  Appoint  Remove  Resign  Other (e.g. Death, Bankruptcy, Incapacity)

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name: |  | | |
| ACN (if a company): | | | |
| Officer name and Role: | | Director | Secretary |
| Officer name and Role: | | Director | Secretary |
| Change of:  Trustee  Appointor  Principal  Guardian | | | |

Continue  Appoint  Remove  Resign  Other (e.g. Death, Bankruptcy, Incapacity)



**Trust Amendment Order**

**Section H: Beneficiary Changes**

**Beneficiary 1.**

|  |
| --- |
| Full Name: |

|  |  |
| --- | --- |
| **Product (select all that apply)**  Add a Beneficiary  Remove a Beneficiary  Renunciation | **Go to section (i)**  **Go to section (ii)**  **Go to section (iii)** |

**(i) If you selected Add Beneficiary, please select one box below**

Add as a -  Specified/Primary/Named Beneficiary  General/Secondary/Tertiary/Potential Beneficiary

**(ii) If you selected Removal of Beneficiary, please select all relevant boxes below**

Remove as a -  Specified/Primary Beneficiary  Other

If removing, will this person -  Remain as a potential beneficiary  Be removed completely from all classes

**(iii) If you selected Renunciation, please complete the details below**

**Reason for Renunciation (must select at least one)**

Centrelink requirement

Marital breakdown

|  |  |
| --- | --- |
| Other (please specify): |  |

**Is the beneficiary willing to sign? (must select one)**

Beneficiary will sign

Beneficiary will not sign

**Is the change revocable or irrevocable** (**must select one**)

Note: if renouncing for Centrelink or as a result of marital breakdown, the renunciation will be irrevocable.

Please advise below if you require otherwise.

Revocable

Irrevocable

**Entitlement type to be renounced (must select at least one).** Note: If renouncing for Centrelink or as a result of marital breakdown, the renunciation will relate to all present and future entitlements. Please advise below if you require otherwise.

All present and future entitlements  Present entitlements only  Future entitlements only



**Trust Amendment Order**

**Section H: Beneficiary Changes continued**

**Beneficiary 2.**

|  |
| --- |
| Full Name: |

|  |  |
| --- | --- |
| **Product (select all that apply)**  Add a Beneficiary  Remove a Beneficiary  Renunciation | **Go to section (i)**  **Go to section (ii)**  **Go to section (iii)** |

**(i) If you selected Add Beneficiary, please select one box below**

Add as a -  Specified/Primary/Named Beneficiary  General/Secondary/Tertiary/Potential Beneficiary

**(ii) If you selected Removal of Beneficiary, please select all relevant boxes below**

Remove as a -  Specified/Primary Beneficiary  Other

If removing, will this person -  Remain as a potential beneficiary  Be removed completely from all classes

**(iii) If you selected Renunciation, please complete the details below**

**Reason for Renunciation (must select at least one)**

Centrelink requirement

Marital breakdown

|  |  |
| --- | --- |
| Other (please specify): |  |

**Is the beneficiary willing to sign? (must select one)**

Beneficiary will sign

Beneficiary will not sign

**Is the change revocable or irrevocable** (**must select one**)

Note: if renouncing for Centrelink or as a result of marital breakdown, the renunciation will be irrevocable.

Please advise below if you require otherwise.

Revocable

Irrevocable

**Entitlement type to be renounced (must select at least one).** Note: If renouncing for Centrelink or as a result of marital breakdown, the renunciation will relate to all present and future entitlements. Please advise below if you require otherwise.

All present and future entitlements  Present entitlements only  Future entitlements only



**Trust Amendment Order**

**Special Instructions/Additional information:**

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

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