**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**

**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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