



On completion of this form, please send to :  
**Nassarisi Rossi Business Services Pty Ltd.**

Via Post: 65G Dulwich Avenue  
Dulwich SA 5065

Via Email admin@nassarisirossi.com.au

Or Fax: (08) 8332 0389

### Discretionary Trust Instruction Form

#### Requesting Party

Name of Firm \_\_\_\_\_

Title \_\_\_\_\_ First Name \_\_\_\_\_ Surname \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Suburb: \_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Email Address: \_\_\_\_\_ Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Date documents required: \_\_\_\_\_

#### Trust Details

Name of Trust \_\_\_\_\_

Governing Law SA | VIC | NSW | QLD | WA | TAS | NT | ACT (please circle)

#### Settlor

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

Settlement Sum \_\_\_\_\_ Settlement Date \_\_\_\_\_

#### Trustees Full name must be provided

##### Trustee 1

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_  
(Or Company Name) (Or ACN)

Address \_\_\_\_\_

\_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

If the Trustee is a corporation, please complete the following information:

Directors Name(s) \_\_\_\_\_

\_\_\_\_\_

**Trustees Full name must be provided**

**Trustee 2**

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

**Trustee 3**

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

**Trustee 4**

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

**Beneficiaries Full name must be provided**

**Primary Beneficiary 1**

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

If there any excluded beneficiaries, please complete the following:

Name(s) of excluded beneficiaries \_\_\_\_\_

**Primary Beneficiary 2**

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

**Primary Beneficiary 3**

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

**Primary Beneficiary 4**

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

**Appointors****Full name must be provided****Appointor 1**

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

**Appointor 2**

Given Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Post Code \_\_\_\_\_

If more than one Appointor, will the Appointors be acting jointly? Yes/No.

**Disclaimer – By engaging Nassaris Rossi Business Services Pty Ltd, please be aware that we do not provide legal, financial or stamp duty advice and we do not take responsibility for your legal, taxation or other liabilities which may arise from work that we may perform on your behalf. You should first obtain legal or financial advice in relation to your affairs before you provide us with your instructions.**