

Unit Trust Instruction Sheet

Documents			
Date of Instructions:	<input type="text"/>	Date documents required by:	<input type="text"/>
Send documents to:	<input type="checkbox"/> Referring Advisor <input type="checkbox"/> Client		
Referring advisor			
Company name:	<input type="text"/>		
Contact name:	<input type="text"/>		
Postal address:	<input type="text"/>		
Contact numbers:	PHONE <input type="text"/>	FACSIMILE <input type="text"/>	
Email address:	<input type="text"/>		
Client details			
Full name(s):	<input type="text"/>		
Residential address:	<input type="text"/>		
Postal address:	<input type="text"/>		
Contact numbers:	BUSINESS <input type="text"/>	HOME <input type="text"/>	
	FACSIMILE <input type="text"/>	MOBILE <input type="text"/>	
Email address:	<input type="text"/>		

Details for preparation of deed

Trust information

Name of the Trust:

Purpose of the Trust:

[e.g., investment to acquire and develop real property]

Jurisdiction: State or territory in which the Trust is to operate:

Trustee—individual(s)

Trustee 1—full name:

Address:

Trustee 2—full name:

Address:

Trustee—company

McMahon Clarke is to incorporate a corporate trustee? (please tick YES NO

The corporate trustee will sign under company seal? (please tick YES NO

Company name:

ABN:

ACN:

Registered office:

Director—1:

Director—2:

Director—3:

Secretary:

Units

Total number of units issued:

Application price for unit in trust:

Details for preparation of deed

Initial unitholder—individual(s)

Unitholder 1Full name: Address: No. of units held: **Unitholder 2**Full name: Address: No. of units held: **Unitholder 3**Full name: Address: No. of units held:

Initial unitholder—company/trust

Unitholder 1McMahon Clarke is to incorporate a corporate trustee? (please tick) YES NOThe corporate trustee will sign under company seal? (please tick) YES NOTrust name: (leave trust name blank if not applicable)Company name: ABN / ACN: Registered office: Director **1** : Director **2** : Director **3** : Secretary:

Details for preparation of deed

Unitholder 2

McMahon Clarke is to incorporate a corporate trustee? (please tick YES NO

The corporate trustee will sign under company seal? (please tick YES NO

Trust name:

(leave trust name blank if not applicable)

Company name:

ABN / ACN:

Registered office:

Director 1 :

Director 2 :

Director 3 :

Secretary:

Unitholder 3

McMahon Clarke is to incorporate a corporate trustee? (please tick YES NO

The corporate trustee will sign under company seal? (please tick YES NO

Trust name:

(leave trust name blank if not applicable)

Company name:

ABN / ACN:

Registered office:

Director 1 :

Director 2 :

Director 3 :

Secretary:

Details for minutes of meeting of unitholders

Quorum: For example, two or more Unitholders who hold at least 51 percent of the units.

Casting vote: Will the chairman have a casting vote? (please tick YES NO

Details of who has power to vary the trust deed

Consent: Percentage of unitholders required to consent to a variation of the trust deed (e.g., unitholder(s) who hold at least 95 percent of the units):

Fees

Our professional fees are as set out below. Please tick the option(s) you require to acknowledge you accept our fees.

Scope of work

Establishment of unit trust:

Yes, I choose this option.

The fee for establishing a unit trust will be \$550 plus GST (i.e., \$605 inclusive of GST) and outlays.

All trust documents will be provided to you on a compact disk. If you prefer to receive your documents in a trust register, we can prepare this for an additional fee of \$200 plus GST (i.e., \$220 inclusive of GST) and outlays. Please tick the box below if you would like a company register prepared.

Yes, please prepare a trust register.

Incorporation of new trustee company:

Yes, I choose this option.

The fee for incorporating a new company will be \$600 plus GST (i.e., \$660 inclusive of GST) and outlays. ASIC charge a registration fee of \$400 to incorporate a new company. At the same time you send us this completed form, please provide us with the ASIC fee of \$400 on account of the registration fees. You can provide these funds either by—

- cheque made payable to "McMahon Clarke Legal Trust Account", or
- direct deposit to our Trust Account at:

A/c Name : McMahon Clarke Trust Account
Bank : ANZ Bank
A/c Number : 8335 49073
BSB : 014 002
Branch : cnr Queen and Creek Streets, Brisbane, Queensland

All company documents will be provided to you on a compact disk. If you prefer to receive your documents in a company register, we can prepare this for an additional fee of \$200 plus GST (i.e., \$220 inclusive of GST) and outlays. Please tick the box below if you would like a company register prepared.

Yes, please prepare a company register.

Fee agreement

Our scope of work is as indicated by you above.

By signing this declaration and returning this completed instruction sheet to us, you are agreeing to the fees and charges quoted above. Any consultation time with you or your adviser/s will be charged at hourly rates. As set out in this instruction sheet, any additional instructions you provide to us or additional drafting that is required will be charged at our firm's hourly rates. We will provide you with an estimate of the additional costs once we know the extent of the additional work involved.

By signing this form you warrant on your own behalf and on behalf of the parties for whom the documents will be prepared that you have read and agreed to this declaration and the instructions you have given are complete and accurate and can be relied upon by us in preparing the documents. We will not verify the accuracy of the information with you.

We need you to confirm you want us to commence work on your behalf by signing and returning this complete instruction sheet and declaration to us.

Client 1

Signature:

Name:

Date:

Client 2

Signature:

Name:

Date:

