K E E L I N S
LAWYERS

Instructions to establish a new

HYBRID UNIT TRUST

To: Keelins Lawyers
Level 4, 459 Little Collins Street, Melbourne 3000
Facsimile (03) 9252 0699

Please prepare the documentation necessary to establish the following hybrid unit trust:

NAME OF TRUST: The _____ Trust

DATE OF TRUST: Leave blank if effective upon signing

TRUSTEE:
Full name of Trustee:
Address:

If a company: ACN:
Directors:

UNITHOLDERS: Attach details of further unitholders on a separate page

1. Name of Unitholder:
Address:

Number of Units: Issue price per unit: $
*Associated Person:

2. Name of Unitholder:
Address:

Number of Units: Issue price per unit: $
*Associated Person:

DOCUMENTS TO BE SENT VIA (select one): Post: ☐ **Email:** ☐ **TO:**
Name:
Firm:
Address:
Telephone:
Facsimile:
Email:

PLEASE CHARGE THE FOLLOWING CREDIT CARD:
Card type: Visa: ☐ Mastercard: ☐ Bankcard: ☐ Amex: ☐
Card number: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐ Expiry date: ___ / ____
Name on card: Card holder signature:

*Discretionary distributions in respect of units can be made to a class of beneficiaries defined by reference to that unitholder's Associated Person. The Associated Person should be the principal individual of the unitholder's family group.