

Farm Discretionary Trust name



Order form: Farm Discretionary Trust

The Castle difference

Opt in

At Castle, we pride ourselves on the service we provide and the value we can add to you and your clients. If you tick the 'opt in' box, we will contact you if we have any suggestions or questions about any information you have entered in the form. If you would prefer for your order to be processed exactly as you have entered below, please do not tick the box. However, if we believe something is incorrect in your form, we will contact you to discuss it.

Order placed by

Your name

Telephone

Facsimile

Firm name

Email address

Firm address

Choose your package – PDFs included with all packages

Electronic Email delivery of all documents in PDF.

Standard All key documents printed. 2 bound deeds.

Premium All documents printed and inserted in a folder (with 2 dividers). 4 bound deeds.

Presented in

- White Folder
- White Folder with Slip Case
- Black Folder
- Black Folder with Vertical Holder
- Black Folder with Box and Lid

Additional order requirements

Apply for an ABN

Yes – complete [ABN application form](#) (additional fee of \$220 applies) No

Applicable Law

VIC NSW QLD SA WA NT TAS ACT

Would you like us to attend to stamp duty¹

Yes No If Yes please choose jurisdiction² VIC NSW NT

¹ Additional fees apply for deeds to be stamped in NSW, and NT

² Stamp duty is only applicable in VIC, NSW, and NT

Delivery

Required delivery date

ASAP Specific date

Please provide specific date

Delivery address

Street address preferred

Firm address (listed above)

Other address

Please provide other address

Payment – The options to pay in 14 or 30 days are only available for approved clients

Pay now Cheque Please make cheques payable to: Castle Corporate Pty Ltd.

Pay now Credit card Please complete a [Credit Card Authorisation form](#) and return with this form.

Pay now Bank deposit Account details: BSB: 083-419, Account: 66332-9114

Please provide reference you will use for direct deposit

Pay in 14 days with our [Enduring Credit Card Authorisation](#)

Pay in 30 days – I, the person named above, agree to pay Castle for this order within 30 days of the invoice date

Declaration

By submitting this form to Castle Corporate Pty Ltd, I warrant and declare that all statements made and all details shown in this order form are true and correct and that all persons named in this order form have consented in writing to their appointment as a Trustee, Settlor or Appointor (as relevant). I indemnify Castle Corporate Pty Ltd for any and all loss suffered as a result of my breach of the aforesaid warranty.

Trust details

Name of trust

Commencement date Same as formation date of corporate trustee Specify date

Settlement sum \$

Note* The Deed shall provide for beneficiaries located overseas under the assumption that the trust shall not be acquiring residential property located in Queensland, New South Wales and/or Victoria.
If this assumption is incorrect, please contact us.

Settlor

Settlor Castle staff member (*note: this option is available for standard and premium packages)
 Other (please specify below)

Settlor name
If not Castle staff member

Settlor address
If not Castle staff member

Trustee(s) – If more than two trustees, please provide their details in the ‘Additional information’ space at the bottom of page 3.

Trustee name ACN

Trustee address

If corporate trustee, name of director(s)
Full Name(s) including titles

Trustee name ACN

Trustee address

If corporate trustee, name of director(s)
Full Name(s) including titles

Appointors

Do you want an appointor? Yes – Please fill in details below NO – Please proceed to page 3 **If neither box is ticked we will assume an appointor is not required**

Name Given name(s) Surname

Address

Name Given name(s) Surname

Address

If you have completed the Appointor’s section, do you want a succession plan? Yes No

First appointor – one person

<input type="checkbox"/> Single appointor	Please number in order of succession	Spouse	Children	LPR	Other	Please provide name and address in Additional information at the bottom of page 3
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First appointor – two or more persons

<input type="checkbox"/> Joint appointors	Last surviving appointor succeeded by:	Spouse	Children	LPR	Other	Please provide name and address in Additional information at the bottom of page 3
<input type="checkbox"/> Family appointors		<input type="checkbox"/> Each person succeeded by his/her legal personal representative (LPR) <input type="checkbox"/> Each person succeeded by his/her spouse <input type="checkbox"/> Other: please use Additional information section at the bottom of page 3.				

Primary beneficiaries

Name	Given name(s)	Surname
Address		
Relationship to first appointor	<input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> LPR <input type="checkbox"/> Other	

Name	Given name(s)	Surname
Address		
Relationship to first appointor	<input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> LPR <input type="checkbox"/> Other	

Name	Given name(s)	Surname
Address		
Relationship to first appointor	<input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> LPR <input type="checkbox"/> Other	

Name	Given name(s)	Surname
Address		
Relationship to first appointor	<input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> LPR <input type="checkbox"/> Other	

Name	Given name(s)	Surname
Address		
Relationship to first appointor	<input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> LPR <input type="checkbox"/> Other	

Additional information – use this space to give us any other information that may help us to complete your order.