**Specialty Trusts**

**Person ordering**

|  |  |
| --- | --- |
| Name:       |  |
| Firm Name:       | Member Number:       |
| Phone:       |  | Email:       |

 **Payment details**

Please select products you require and provide credit card details for payment. Documents will be emailed in PDF format unless bound and delivered is selected.

|  |  |  |  |
| --- | --- | --- | --- |
| VIC Pharmacy Trust Deed | [ ]  **$880**  | VIC stamp duty on Trust establishment | [ ]  **$255\***  |
| NSW Pharmacy Trust Deed | [ ]  **$880**  | NSW stamp duty on Trust establishment | [ ]  **$805\*\***  |
| South Australia Family Farm Trust Deed | [ ]  **From $330**  | Bound & Delivered (slimline presentation Box) | [ ]  **$66** |
| Victoria Family Farm Trust Deed | [ ]  **From $330** |  |
| NSW Family Farm Trust Deed | [ ]  **From $330** |  |
| Special Disability Trust | [ ]  **$660** |  |  |

|  |
| --- |
| \*includes $200 VIC stamp duty and stamping fee.  |
| \*\*includes $750 NSW stamp duty and stamping fee. Extra $10 for each additional deed. |
| [ ]  On Account\*  | [ ]  Visa  | [ ]  Mastercard  | [ ]  Amex |
| Card Holder Name:       |
| Credit Card Number:       |
| Expiry Date:       /       | Authorised Card Signature:       |

 All prices include GST, and the documents will be sent to the nominated email address in PDF format.

 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.

**Trust Details**

|  |  |
| --- | --- |
| Full Name of Trust:       |  |
| Governing State:       |  |  |

**Please complete all details and provide full legal names. Handwritten forms must be legible.**

**Return completed form to** **info@docscentre.com.au**



**Specialty Trusts**

**Settlor**

|  |  |
| --- | --- |
| Full Name of Settlor:       |  |
| Address:       |  |
| (As the settlor cannot be a beneficiary under the trust, we will not accept a settlor who is a family member who the trustee may later want to benefit. The preferred settlor is often a family friend or associate. Whilst it is not specifically recommended, the settlor could be the client’s accountant/tax agent provided the client does not refund or reimburse (directly or indirectly) the settled sum to the accountant/tax agent). |
| Settled Sum: $      |

**Trustee**

|  |  |  |
| --- | --- | --- |
| Name of Trustee:       |  |  |
| ACN:       |  |  |
| OR full names of individual Trustee(s):       |
| Officeholders name of Trustee Company (if applicable) |  |  |
| 1.       | [ ]  Director | [ ]  Secretary |
| 2.       | [ ]  Director | [ ]  Secretary |
| 3.       | [ ]  Director | [ ]  Secretary |
| 4.       | [ ]  Director | [ ]  Secretary |
| Street address:       |  |  |
| Suburb:       | State & Post Code: |       |

**Beneficiaries**

Full names of Primary Beneficiaries

|  |  |
| --- | --- |
| Name:       | D.O.B:       |
| Address:       | State & Post Code:  |       |
| Name:       | D.O.B:       |
| Address:       | State & Post Code:  |       |

|  |  |  |  |
| --- | --- | --- | --- |
| **Exclude Foreign Beneficiaries** | [ ]  Yes | [ ]  No |  |



**Specialty Trusts**

**Appointor(s)**

|  |  |
| --- | --- |
| Full Name:       | D.O.B:       |
| Address:       | State & Post Code:  |       |
| Full Name:       | D.O.B:       |
| Address:       | State & Post Code:  |       |

|  |  |
| --- | --- |
| Full Name:       | D.O.B:       |
| Address:       | State & Post Code:  |       |

**Special instructions regarding Appointor:**

|  |
| --- |
|       |
|       |
|       |
|       |

\* Joint appointors have the right of survivorship meaning that (unless the appointors otherwise unanimously determine) as one dies or is otherwise removed, their powers of appointment go to the remaining joint appointors and so on until there is effectively the ‘last man standing’. Then either his or her legal personal representative becomes the appointor.

By completing this order form and returning to Docscentre you confirm that you have read and accepted our terms and conditions which can be found here – [www.docscentre.com.au/terms-and-conditions/](http://www.docscentre.com.au/terms-and-conditions/)

**What is South Australian Family Farm Trust?**

The SA Family Farm Trust is designed to specifically meet the eligibility requirements for an exemption of stamp duty where all or part of a family farm is being transferred from one party to another and a familial link exists. A familial link requires that the transfer must occur between related persons who include, spouse and spouse, parent to child and their spouse, grandparent to grandchild and their spouse, sibling to sibling and their spouse, and uncle/aunt to nephew/niece.

**Specialty Trusts**

**What is Victorian Family Farm Trust?**

The Victorian Family Farm Trust is designed to specifically meet the eligibility requirements for an exemption of stamp duty where all or part of the family farm is being transferred from one party to another and a familial link exists. A familial link requires that the transfer must occur between related persons who include, spouse and spouse, parent to child and their spouse, grandparent to grandchild and their spouse, sibling to sibling and their spouse, and uncle/aunt to nephew/niece.

To apply for the stamp duty exemption, you must use [the Digital Duties Form](https://www.sro.vic.gov.au/completeform) to claim this exemption. <https://www.sro.vic.gov.au/completeform>

The transfer can be lodged using [Duties Online](https://www.sro.vic.gov.au/duties-online) if the transfer is between natural persons. If a trust is involved, a copy of the duly stamped trust deed must also be lodged with these documents. <https://www.sro.vic.gov.au/duties-online>

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| A logo with a castle in the middle  Description automatically generated  Partnering with you to get it right. Since 1995 |

