

Discretionary (Family) Trust Setup — Fillable Client Form

Use this form to provide the details we need to establish a discretionary (family) trust on your behalf. Type into the input boxes below, tick each item as you complete it, then save the PDF and email it back to info@trinitygroup.com.au. Fill in what you have now — we will follow up on anything missing.

Useful government links

- ABN application: abr.gov.au
- Director ID (if using a corporate trustee): abrs.gov.au/director-identification-number
- NSW Revenue — trust stamp duty: revenue.nsw.gov.au/duties
- GST & PAYG registration: ato.gov.au/businesses/registrations

1. Trust Details

☐ **Proposed trust name**

e.g. 'Smith Family Trust' — most family trusts use the family surname.

☐ **Proposed date of settlement**

The date the trust deed will be signed.

☐ **State of jurisdiction**

Trust will be governed by the law of this state — usually NSW.

☐ **Trust vesting date (default 80 years from settlement)**

2. Trustee Structure

☐ **Individual trustee(s) — simpler and cheaper to set up**

☐ **Corporate trustee — recommended for asset protection and continuity**

☐ **Existing corporate trustee — company name and ACN (if already incorporated)**

Leave blank if we are also incorporating the trustee company.

☐ **Corporate trustee — preferred company name (1st choice)**

We will check ASIC name availability. Please give us three options in case one is taken.

☐ **Corporate trustee — 2nd choice name**

Used if the 1st choice is unavailable.

☐ **Corporate trustee — 3rd choice name**

Used if both above are unavailable.

☐ **Corporate trustee — registered office address**

Where ASIC will send notices. You may use our office (159 Stoney Creek Road, Beverly Hills NSW 2209) with our consent.

☐ **Corporate trustee — principal place of business (if different from registered office)**

3. Trustee Details

☐ **Trustee 1 — full name**

Individual trustee or director of the corporate trustee.

☐ **Trustee 1 — date of birth**☐ **Trustee 1 — residential address**☐ **Trustee 1 — Tax File Number (TFN)**☐ **Trustee 1 — Director ID (if corporate trustee)**

Apply at abrs.gov.au if not yet held.

☐ **Trustee 2 — full name (if applicable)**☐ **Trustee 2 — date of birth (if applicable)**☐ **Trustee 2 — residential address (if applicable)**☐ **Trustee 2 — TFN (if applicable)**

- ☐ **Trustee 2 — Director ID (if corporate trustee)**

4. Settlor

- ☐ **Settlor — full name**

Must be a person unrelated to the beneficiaries — typically a family friend or your accountant.

- ☐ **Settlor — residential address**

- ☐ **I understand the settlor contributes a nominal sum (usually \$10) to establish the trust**

5. Beneficiaries

- ☐ **Primary beneficiary 1 — full name**

Usually the main person/people the trust is intended to benefit.

- ☐ **Primary beneficiary 1 — date of birth**

- ☐ **Primary beneficiary 1 — relationship to trustee**

- ☐ **Primary beneficiary 2 — full name (if applicable)**

- ☐ **Primary beneficiary 2 — date of birth**

- ☐ **Primary beneficiary 2 — relationship to trustee**

- ☐ **Additional beneficiaries (children, grandchildren, related entities, etc.)**

List names — the deed typically includes a wide class by default.

6. Trust Deed

- ☐ **Standard discretionary trust deed — recommended (we will provide)**
- ☐ **Custom deed — I will provide a copy**

- ☐ I understand NSW stamp duty (currently \$750) is payable within 3 months of execution

7. Tax & Compliance Registrations

- ☐ Apply for ABN
- ☐ Apply for TFN
- ☐ Register for GST (projected turnover above \$75,000 p.a.)
- ☐ Register for PAYG withholding (will be paying wages)

8. Banking & Operational Setup

- ☐ Proposed bank for trustee account

Most major banks need the executed trust deed, TFN and ABN to open the account.

- ☐ Set up Xero / accounting software (Trinity can configure)
- ☐ I understand the trustee must sign annual distribution minutes before 30 June each year

9. Notes / Anything else we should know

Signed (type your name)

Date

How to return this form to Trinity

1. Click each input field above and type your details.
2. Save the completed PDF (*File* → *Save* or *Ctrl+S* / *Cmd+S*).
3. Email the saved PDF to info@trinitygroup.com.au (click to open your mail app pre-filled).
4. Or print and drop in at **159 Stoney Creek Road, Beverly Hills NSW 2209**.

Tip — to print: press Ctrl+P (Windows) or Cmd+P (Mac).