

	<i>Please complete</i>
<b>New Discretionary Trust with Corporate Trustee</b>	
▪ <b>Name of trust</b>	
▪ <b>Principal place of business (Please note that this must be a physical address and cannot be a PO Box).</b>	
▪ <b>Principal / Appointer – person who appoints the trustee</b>	
▪ <b>Primary beneficiary 1</b>	
○ Full name	
○ Street address	
○ Date of birth	
○ Tax file number	
▪ <b>Primary beneficiary 2 (if applicable)</b>	
○ Full name	
○ Street address	
○ Date of birth	
○ Tax file number	
▪ <b>Preferred Name of Corporate Trustee</b>	
○ 1 <sup>st</sup> Choice	
○ 2 <sup>nd</sup> Choice	
▪ <b>Director 1 / Public Officer / Company Secretary</b>	
○ Surname	
○ Given names	
○ Former or maiden names	
○ Residential address ( <i>the address cannot be a post office box address</i> )	
○ Mobile phone	
○ Date of birth	
○ Place of birth	
▪ <b>Director 2 (if applicable)</b>	
○ Surname	
○ Given names	
○ Former or maiden names	
○ Residential address ( <i>the address cannot be a post office box address</i> )	
○ Mobile phone	

o Date of birth	
o Place of birth	
	<b>Please complete</b>
<b>Other Registration Details</b>	
Would you like us to apply for:	
<ul style="list-style-type: none"> <li>• Tax File Number (TFN) and Australian Business Number (ABN)?</li> </ul>	Yes
<ul style="list-style-type: none"> <li>• Please provide a description of your main business activity</li> </ul>	
<ul style="list-style-type: none"> <li>• GST registration?</li> </ul>	
<i>If yes, then please provide details as follows:</i>	
<ul style="list-style-type: none"> <li>o Estimated annual turnover?</li> </ul>	
<ul style="list-style-type: none"> <li>o Monthly, Quarterly or Annual lodgment of Business Activity Statement (BAS)</li> </ul>	
<ul style="list-style-type: none"> <li>o Cash or Accruals basis of remittance</li> </ul>	
<ul style="list-style-type: none"> <li>• PAYG Withholding Employer registration?</li> </ul>	
<i>If yes, then please provide details as follows:</i>	
<ul style="list-style-type: none"> <li>o Date withholding will commence?</li> </ul>	
<ul style="list-style-type: none"> <li>o Will the entity pay royalties, dividends or interest to non-residents or report investment income paid to Australian residents?</li> </ul>	
<ul style="list-style-type: none"> <li>o Estimated number of employees?</li> </ul>	
<ul style="list-style-type: none"> <li>o Estimated annual gross wages?</li> </ul>	
<ul style="list-style-type: none"> <li>o Estimated annual tax withheld from wages?</li> </ul>	
<b>Domain Name</b>	
You should consider if you require a domain name and register if required	

*Our standard fee for the setup of your entity, together with the Australian Securities and Investments Commission (ASIC) and Legal Document fees, which we will charge for reimbursement, are set out below:*

Our fee for services	\$400.00
ASIC Company Registration Fee (current as at June 2022)	\$543.65
Company Constitution	\$560.00
Trust Deed	\$260.00
Total before GST	\$1,763.38
GST	\$176.34
Total including GST	\$1,939.72

*Please confirm that you would like Addept Pty Ltd to assist in the setup of the new entity, as requested above, and that you accept the associated fees and charges to be paid upon issue of our invoice to you:*



chartered accountants +  
business advisors

Signature:	Signature:
Name:	Name:
Date:	Date: