

## APPLICATION FORM

# Discretionary trust deed review

### Price list

Action	Price excluding GST
Bulk review, advice and variation	By negotiation
Review and advice (excluding variation of trust deed): <ul style="list-style-type: none"> <li>• Review trust deed and supplemental documents (if any); and</li> <li>• Provide advice as to whether variation of trust deed is required, and whether trust deed contains appropriate variation power.</li> </ul>	To be discussed once documents have been provided
Review and variation: <ul style="list-style-type: none"> <li>• Review trust deed and supplemental documents (if any);</li> <li>• Prepare Deed of Variation and Trustee Minutes will ensure the Trustee has the power to:               <ul style="list-style-type: none"> <li>– determine what is income for trust purposes;</li> <li>– recognise, record and distribute different classes of income, including capital gains;</li> <li>– make a beneficiary specifically entitled to a capital gain or dividend; and</li> <li>– establish sub-trusts with broad related powers.</li> </ul> </li> </ul>	To be advised once review is completed

If you have any questions about completing the application form please contact:

**Christopher Davis**

*Principal*

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Email: cdavis@mcw.com.au

**Neal Dallas**

*Principal*

Phone: (07) 3014 6598

Email: ndallas@mcw.com.au

By completing and submitting the form you confirm as follows:

- a. It is the purchaser's responsibility to ensure that the information supplied is correct.
- b. If new documents have to be prepared as a result of errors in the information a further fee will be payable.

Please ensure you complete all details below, and contact us with any questions you have prior to submitting the form.

## PRICES

Review	To be advised
Review and variation	To be advised

## PURCHASER'S DETAILS

First name

Surname

Name of firm (if applicable)

Telephone

Fax

Email address

Street Address

Suburb/City

State

Postcode

Postal Address  
*(if different from above)*

Suburb/City

State

Postcode

## ATTACH DOCUMENTS

Please attach copies of the original trust deed, all deeds of variation, deeds of retirement and appointment of trustee and any other documents you consider relevant to the review.

## RETURNING THIS FORM

After completing this form please either:

- print, sign, and fax it to McInnes Wilson Lawyers at (07) 3221 2921; or
- print, sign, scan, and email it to McInnes Wilson Lawyers at mcwonline@mcw.com.au; or

To print this form for signing click here:

To email this form to McInnes Wilson Lawyers, after confirming instructions below, click here:

## CONFIRMATION OF INSTRUCTIONS

The purchaser agrees to purchase the goods and services indicated on this application form.

Signed by purchaser

Date (dd/mm/yy)

OR

Confirmed by purchaser

Date (dd/mm/yy)

Note: This application form will not be processed by McInnes Wilson Lawyers unless this section is completed.

## CREDIT CARD PAYMENTS

Please debit the following credit card for the supply of goods and services indicated on this application form.

Note: Payment by credit card will incur a fee of 1.07% (incl GST) for VISA and MasterCard, and 3% (incl GST) for AMEX, on the GST inclusive price.

Credit card:

Visa            MasterCard            American Express

Total Remitted \$

Expiry date

*plus credit card fee specified above*

Cardholder's Name

Card Number

Cardholder's Signature

Date