

SYMBOLIC SYSTEMS PTY LTD

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VARIATION OF DISCRETIONARY TRUST INSTRUCTION SHEET

Please email the completed form and a copy of the trust deed to admin@symbolic.com.au

Instructing Firm:	
Contact Name:	
Contact Telephone:	
PLEASE COMPLETE <u>EVERY</u> SECTION AND PROVIDE THE ADDITIONAL INFORMATION REQUIRED TO BE SUBMITTED ALONG WITH THE COMPLETED INSTRUCTION FORM	
Name of Trust:	
Settlement Date:	
Settlor Name:	
Settlor Address:	
Name of Existing Trustee:	
Address of Existing Trustee:	
ACN (If Applicable):	
Name of NEW Trustee:	
ACN of NEW Trustee:	
Address of NEW Trustee:	
Director of NEW Trustee (1):	
Director of NEW Trustee (2):	
Name of Current Guardian (1):	
Address of Current Guardian (1):	
Name of Current Guardian (2):	
Address of Current Guardian (2):	
Name of New Guardian (1):	
Address of New Guardian (1):	
Name of New Guardian (2):	
Address of New Guardian (2):	

Name of Original Appointor (1):		
Address of Original Appointor (1):		
Name of Original Appointor (2):		
Address of Original Appointor (2):		
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Name of New Appointor:		
Address of New Appointor:		
State Law Applicable:		
LIST ALL AMENDMENTS REQUIRED:		
TICK APPROPRIATE BOX		
<input type="checkbox"/>	CHANGE TRUST NAME TO....	
<input type="checkbox"/>	CHANGE TRUSTEE	
<input type="checkbox"/>	CHANGE APPOINTOR	
<input type="checkbox"/>	CHANGE GUARDIAN	
<input type="checkbox"/>	OTHER – Please specify:	
<hr/>		
<i>Please read and sign below:</i>		
<p>You are hereby appointed to act as our agent to procure changes to an existing Trust Deed, the particulars for such being set out above. In consideration for your acting as our agent, attending to provision of the documentation and delivery, we shall pay such amount as agreed.</p>		
<p>ORDERED BY: Signed:</p>		
<hr/>		
ARE THE REQUIRED AMENDMENTS CENTRELINK MOTIVATED?		
YES	<input type="checkbox"/>	NO <input type="checkbox"/>
<u>NOTE</u>		
<p>If amendments are Centrelink motivated, not only will the Centrelink benefit recipient need to be removed as a trustee, guardian or appointor of the trust and waive any beneficial interest in the trust, <i>these actions will also be necessary for the benefit recipient's spouse.</i></p>		
<u>IMPORTANT</u>		
<p>To avoid the possibility of “re-settling” the trust, it is ESSENTIAL that the classes of beneficiaries are not altered by the reviewed trust deed. To avoid this, you must provide us with a copy of the trust deed together with all amending deeds.</p>		