



Hybrid Trust Order Form

Gatherum-Goss & Associates



We do recommend you seek legal advice before creating a trust so that you are aware of any legal implications that might be involved, and to further ascertain if the structure is appropriate for your needs. Please note that setting up a trust will not help if you are currently in the process of being sued.

In order to complete your Hybrid Trust we will need a few details, so please take a second to answer all of the following questions so we can make a start...

Please also be aware that we do require the full payment of \$2,500.00 for the Hybrid Trust before we can make a start (either by cash, cheque, money order or credit card).

For the Trustee Company we will need:

Company Name (1st preference): _____ **Pty Ltd**

Company Name (2nd preference): _____ **Pty Ltd**

Note: We require two preferences for your Company Name in the event that your first preference is unavailable. Try checking these names at the following website to ensure they are NOT already taken: <http://www.search.asic.gov.au/gns001.html>

The Directory/Secretary/Shareholder of the Company can be either one person, or joint.

Director

Full Name (incl. middle names): _____

Date of Birth (DOB): _____ / _____ / _____ (DD/MM/YYYY)

Place of Birth (Town & Country): _____

Home Address : _____
(not a post office box)

Phone Number: () _____

Director (2nd) * **Please tick if not applicable →* *N/A*

Full Name (incl. middle names): _____

Date of Birth (DOB): _____ / _____ / _____ (DD/MM/YYYY)

Place of Birth (Town & Country): _____

Home Address : _____
(not a post office box)

Phone Number: () _____

Secretary

Full Name (incl. middle names): _____

Date of Birth (DOB): _____ / _____ / _____ (DD/MM/YYYY)

Place of Birth (Town & Country): _____

Home Address : _____
(not a post office box)

Phone Number: () _____



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Secretary (2nd)*

**Please tick if not applicable →*

N/A

Full Name (incl. middle names):

Date of Birth (DOB):

____ / ____ / ____ *(DD/MM/YYYY)*

Place of Birth (Town & Country):

Home Address :

(not a post office box)

Phone Number:

()

Shareholder

Full Name (incl. middle names):

Date of Birth (DOB):

____ / ____ / ____ *(DD/MM/YYYY)*

Place of Birth (Town & Country):

Home Address :

(not a post office box)

Phone Number:

()

Shareholder (2nd)*

**Please tick if not applicable →*

N/A

Full Name (incl. middle names):

Date of Birth (DOB):

____ / ____ / ____ *(DD/MM/YYYY)*

Place of Birth (Town & Country):

Home Address :

(not a post office box)



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Principal Beneficiary (4th) *

**Please tick if not applicable →*

N/A

Full Name:

**Home Address
(not a post office box):**

Principal Beneficiary (5th) *

**Please tick if not applicable →*

N/A

Full Name:

**Home Address
(not a post office box):**

Principal Beneficiary (6th) *

**Please tick if not applicable →*

N/A

Full Name:

**Home Address
(not a post office box):**

Main purpose of the Trust:

If investing in property:

- Residential
- Commercial

And; are you seeking:

- Positive cashflow; probably with low capital growth
- Positive cashflow; hopefully with good capital growth
- Negative cashflow; hopefully with good capital growth

Is GST registration required? **YES** **NO**

Note: If you are unsure if your Trust is required to register for GST, please speak to your accountant for further advice/guidance and see the FAQ document for further information.