

Special Disability Trust

Instruction Form



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Instruction Form for a Special Disability Trust

Name of the Trust: Special Disability Trust
(You can use any title you wish. You may simply want to use your name or the disabled person's name.)

Beneficiary (disabled person) full name:

Date of birth: / /

Address:

(There can only be 1 beneficiary per trust)

Trustee(s) full name: 1. **ACN** (if applicable)

2.

Trustee's address:

(This is generally the parents or a close family member. Alternatively it can be a company that the parents or family member are directors of. You are the best person to look after your child.)

Appointor(s) full name:

.....

Appointor's Address:

(Once again, you know what your child's needs are. If you are putting in the assets then you keep control by being the Appointor.)

What happens after the above Appointor dies?

Back up Appointor(s) full name:

.....

Back up Appointor's Address:

(This can be your other children)

Residuary Beneficiary names:

.....

.....

(After you, the parents, these are the people who get the trust assets when the disabled person dies)

Your Adviser's Name:

Your Adviser's address:

(Brett Davies Lawyers is a private law firm. You need to be referred in writing, by your own lawyer, accountant or adviser before we can accept any instructions.)

The contact person is:
Your telephone: Your fax: Your
email:.....
(We may need to contact you when any questions.)

I enclose a cheque or credit card for \$1,100 being the total cost of the Special Disability Trust (with no legal or taxation advice). I note that the settlor will be a solicitor from Brett Davies Lawyers and it will be stamped in WA. The \$1,100 includes the WA stamp duty. If I require legal advice the fee is \$440/hour.

Credit Cards	
<i>Please circle one:</i> Visa / MasterCard / Bankcard	
Account Number	Expiry Date
Name on Card	Signature