

HYBRID TRUST ORDER FORM

1. **Name of Trust:** _____

2. **Trustee (Full name and address if Company, ACN and registered office):**

3. **Initial Fixed Beneficiaries:**

(a) **Initial Fixed Beneficiary 1:**

i) Full Name: _____

ii) ACN (if applicable): _____

iii) Address: _____

(b) No. of units: _____

Initial Fixed Beneficiary 2:

i) Full Name: _____

ii) ACN (if applicable): _____

iii) Address: _____

iv) No. of units: _____

(c) **Initial Fixed Beneficiary 3:**

i) Full Name: _____

ii) ACN (if applicable): _____

iii) Address: _____

iv) No. of units: _____

4. **Price of Initial Units:** \$ _____

5. **Please note that the generic beneficiaries include the following. If any need to be excluded, please advise:**

- Spouse/Widow of named beneficiary
- Direct lineal descendants
- Direct lineal ascendants
- Siblings
- Related Companies and/or Trusts
- Aunts, Uncles, Cousins
- Educational bodies
- Charities

6. Specific requirements if not standard:

(a) Powers of Trustee:

(b) Other:

Please note that, subject to other instructions received and advice provided, these requirements will be incorporated into the Pointon Partners standard form hybrid trust deed.

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