

Date:

Please open a trust account in the Trust Name below: *Account Number*

**1) For a Sole Trustee Account**

(1) Surname

First Name

Membership No.

Sign .....

**2) For a Joint Trustee Account**

(1) Surname  (2) Surname

First Name  First Name

Membership No.  Membership No.

Sign ..... Sign .....

**3) Joint Account Method of Operation**

Any One to Sign

All parties to sign

Other (specify)

**4) For a Company Trustee**

Company Trustee

Membership No.

Sign.....

I/we make the following disclosures about the trust:

**5) Trust Name**

Full name of trust - e.g. Smith Family Trust

Name of deceased estate (Please bring Probate, Letters of Administration or the will, or a copy of any of them, for us to sight)

Trust or Estate Tax File Number or ABN

**6) Beneficiary's Details – for more than 5 beneficiaries, attach a separate list  
[Not required for Superannuation trusts registered with the Australian Taxation Office]**

**1<sup>st</sup> Beneficiary**

<b>(1) Full name of beneficiary, person subject to Guardianship Order or infant</b>	
<b>Residential Address</b>	

**2nd Beneficiary**

<b>(2) Full name of beneficiary, person subject to Guardianship Order or infant</b>	
<b>Residential Address</b>	

**3<sup>rd</sup> Beneficiary**

<b>(3) Full name of beneficiary, person subject to Guardianship Order or infant</b>	
<b>Residential Address</b>	

**4<sup>th</sup> Beneficiary**

<b>(4) Full name of beneficiary, person subject to Guardianship Order or infant</b>	
<b>Residential Address</b>	

**5<sup>th</sup> Beneficiary**

<b>(5) Full name of beneficiary, person subject to Guardianship Order or infant</b>	
<b>Residential Address</b>	

<b>7) Details of the Class of Beneficiaries for Discretionary Trusts – if unsure, check details with your accountant</b>	
<b>If the trust is a discretionary trust, give details of the class of beneficiaries</b>	

**Office Use Only:**

- Customer Identification Procedure – Trustee carried out & recorded
- For Deceased Estates – copy of Will, Probate or Letter of Administration provided and filed in member's file
- For ATO registered superannuation funds – copy of the ATO Business Register Cert. or ABR search obtained & filed

**Record details of Probate, Letters of Administration or Guardianship Order**

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