



Special Disability Trust Order Form

Name	<input type="text"/>	Phone	<input type="text"/>
Firm	<input type="text"/>	E-mail	<input type="text"/>

IMPORTANT: Please refer to page 2 for critical information regarding the establishment of your trust.

Name of Trust

Trust is to be settled (select): Direct OR Power of Attorney (see over)

Meeting Address

Trustee Address

Settlor:
Acis Settlements or

Settlement Sum:
\$10.00 or

Trustees

IMPORTANT: Full, verifiable names are required.

Corporate Trustee
(if applicable)

ACN

TFN*

Officer Names
and Roles

(First Officer listed to be
Chairman, first 2 Officers
to be signatories)

<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary

Director Secretary

Director Secretary

Director Secretary

Director Secretary

Individual Trustee/s
(First person listed to be
Chairman)

<input type="text"/>	TFN*	<input type="text"/>
<input type="text"/>	TFN*	<input type="text"/>
<input type="text"/>	TFN*	<input type="text"/>
<input type="text"/>	TFN*	<input type="text"/>

TFN*

TFN*

TFN*

TFN*

*Providing TFNs is optional, but will benefit ABN/TFN applications.

Appointers & Beneficiaries

Appointer/s of Trust

Primary Beneficiaries

Special Disability Trusts

The Federal Government, Centrelink and the Department of Veterans Affairs have mandated a particular form of special disability trust for the future care and accommodation needs of person with severe disabilities. Our standard Special Disability Trust Deed incorporates the terms of a model trust deed provided for the purpose which will be supplied to you upon completion of this order.

You must however satisfy yourself that the beneficiaries of this trust qualify for the concessions available to such a trust and that the trust deed complies with the requirements of the relevant department in order to obtain those concessions

Special Disability Trust Order Form

Additional Information/Special Instructions

Payment Details

Please debit the following card details by the amount of \$

Type of Card Visa Mastercard Diners Club* Amex* *3% SURCHARGE APPLIES

Card Number Expires CCV

Name on Card Signature

Establishment of your Trust

Acis provides trust establishments in 3 ways:

- Settled direct - we provide Settlor** - Acis Settlements Pty. Ltd. acts as the Settlor and the Trust Deed is prepared and delivered to you for execution by the Trustee. The Trust's jurisdiction will be that in which the Trustee/s execute the Trust Deed and settlement stamp duty may (or may not) apply in that jurisdiction.
- Settled direct - you provide Settlor** - the Trust Deed is prepared and delivered to you for execution by the Settlor and Trustee. The Trust's jurisdiction will be that in which the Trustee/s execute the Trust and settlement stamp duty may (or may not) apply in that jurisdiction.
- Power of Attorney** - Acis Settlements Pty. Ltd. acts as the Settlor and Acis Nominees Pty. Ltd. will sign the Trust Deed on behalf of the Trustee under Power of Attorney. As all documents are signed in our office, the Trust's settlement jurisdiction will be Queensland. The power of attorney is restricted to the act of signing the deed only and does not constitute a general Power of Attorney i.e. once the deed is signed, the power of attorney effectively ends. If not accompanying your order, the executed Power of Attorney MUST be returned to us for the trust to be properly established.

For convenience, a blank Power of Attorney is attached. You should note that a trustee company cannot execute a Power of Attorney prior to its registration.

Dating your Trust

When establishing your Trust, the following procedures will apply:

- If the Trust Deed is to be settled direct using Acis Settlements Pty. Ltd. as the Settlor (and your instructions do not specify a subsequent date), the Trust Deed will be dated when it is executed by the Settlor.
- If you provide the Settlor (and your instructions do not specify a subsequent date), the Trust Deed will be supplied undated.
- If the Trust Deed is executed under Power of Attorney, the Trust will be dated on the day we receive the properly executed Power of Attorney from you (regardless of the date appearing on the Power of Attorney).

Notes

It is vital that your Trust Deed is properly executed and the settlement sum received and deposited to a trust bank account BEFORE the trust undertakes any transactions. If the trust deed is not properly executed:

- the trust may be improperly established, not established at all or invalid;
- adverse taxation (particularly CGT) and stamp duties issues may arise.



Power of Attorney

I/We (Insert ALL Names) _____

(the "Proposed Trustee/s")

of (Insert Address) _____

make the following RECITALS:

(A) I/We have agreed to act as trustee/s of:

Name of Trust _____

(the "Trust")

(B) I/We have agreed to the engagement of Acis Nominees Pty Ltd ACN 146 588 767 to establish the Trust.

(C) I/We have agreed to appoint Acis Nominees Pty Ltd ACN 146 588 767 to be my/our attorney to execute the Trust Deed of the Trust.

THE PROPOSED TRUSTEE/S CONSTITUTE Acis Nominees Pty Ltd ACN 146 588 767 to be my/our true and lawful attorney to enter into and sign the Trust Deed for the Trust between Acis Settlements Pty. Ltd. ACN 081 961 391 as Settlor and the Proposed Trustee/s.

I/WE FURTHER APPOINT Acis Nominees Pty Ltd ACN 146 588 767 to be my/our attorney for the purpose of receiving the Settlement Sum (as defined in the Trust Deed) from the Settlor.

This Power of Attorney is signed, sealed and delivered DATED: / /

Individual Trustee/s

SIGNED by:

Proposed Trustee

Proposed Trustee

Proposed Trustee

Proposed Trustee

Witness

Witness

Witness

Witness

Corporate Trustee

Executed by the Officers of the Proposed Trustee:

Director Sole Director Sole Secretary

Director Secretary

This is an important document and must be retained by the trustee/s.

Please return this completed form to acis@acis.net.au, Freefax 1800 655 556 or Locked Bag 1, Fortitude Valley Q 4006