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FAMILY TRUSTS

INSTRUCTION SHEET

TO (Your Solicitor)

The following instructions outline the basic requirements for creating a family trust. If there are special factors to consider or you want advice, please call us

A. SETTLOR.....
(person creating trust- someone who has natural love and affection for you and your wife/husband)

B. TRUSTEES.....
(full names, addresses, occupations: preferably a professional trustee independent of you, and you and your wife/husband)

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C. ADVISORY TRUSTEE/.....
(If any)

D. PREFERRED NAMES OF TRUST
(for identification purposes)

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E. DISCRETIONARY BENEFICIARIES

You.....

Your wife /husband.....

Children.....

Grandchildren.....

F. OBJECTIVES: (Any ideas in mind about what you want to achieve)

Protection of Assets.....

Estate and Succession planning.....

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G WISHES: (What do you want the Trustees to do with what, for whom?)

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H. SPECIAL CONSIDERATIONS OR CONCERNS

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I. TRUST FUND: (What assets, their location and their value are to be transferred to the new trust?)

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J. SPECIAL ADVICE NEEDED? (There may be factors you would like us to explain to you)

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