**Change Of Unitholding -** Unit Issue,

Transfer and/or Redemption

**Person ordering**

|  |  |
| --- | --- |
| Name:       |  |
| Firm Name:       |
| Member Number:       |
| Phone:       | Email:       |  |

**Payment details**

Please select required products and provide credit card details for payment.

|  |  |  |  |
| --- | --- | --- | --- |
| Issue of Units\*  | [ ]  **$350**  | Transfer of Units\* | [ ]  **$350**  |
| Redemption of Units\* | [ ]  **$350**  |  |  |

**\***Additional fees apply for more than 3 unitholder changes (call for a quote)

 All prices include GST and the documents will be sent to the nominated email address in PDF format.

**Please provide a scanned copy of the executed Trust Deed**

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  On Account\*  | [ ]  Visa  | [ ]  Mastercard  | [ ]  Amex |
| Card Holder Name:       |
| Credit Card Number:       |
| Expiry Date:       /       | Authorised Card Signature:       |

 Note that our staff will call you to request the CVV when payment is processed.

\*To pay on account, you must have a current On Account Agreement with Docscentre.

**Section A: Current Trust details**

|  |  |
| --- | --- |
| Name of Trust:       |  |

Please also provide details of any changes made since that deed was executed.

**Please complete all details in legible handwriting and provide full legal names.**

**Return completed form, a copy of the signed trust deed, and any subsequent amendment documentation to** **info@docscentre.com.au**

**Change Of Unitholding -** Unit Issue,

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**Section B: Trustee Details**

**Trustee**

|  |  |
| --- | --- |
| Corporate Trustee Name (if applicable):       | ACN:       |
| Trustee 1/Director Full Name:       |
| Trustee 2/Director Full Name:       |
| Trustee 3/Director Full Name:       |
| Trustee 4/Director Full Name:       |

**Section C: Unitholder Details**

**Unit Holders -** If there are any other unitholders, please attach their details in a separate form.

|  |  |
| --- | --- |
| **Unitholder 1** Full Name:  |       |
| Address:  |       |
| ACN (if a company):  |       |  |
| No. and class of units held (**before** the issue/transfer/ redemption):       |
| For an **issue** of new units | No. of units:        | Class:        | Price/unit: $      |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |  |
| For a **transfer** of units  | No. of units:        | Class:        | Price/unit: $      |
| **Transferee** Full Name:  |       |
| Address:  |       |
| ACN (if a company):  |       |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |  |
| For a **redemption** of units  | No. of units:        | Class:        | Price/unit: $      |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |
| No. and Class of units held by Unitholder 1 *after* the transfer/redemption (if applicable):       |

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**Change Of Unitholding -** Unit Issue,

Transfer and/or Redemption

**Section C: Unitholder Details continued**

|  |  |
| --- | --- |
| **Unitholder 2** Full Name:  |       |
| Address:  |       |
| ACN (if a company):  |       |  |
| No. and class of units held (**before** the issue/transfer/ redemption):       |
| For an **issue** of new units | No. of units:        | Class:        | Price/unit: $      |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |  |
| For a **transfer** of units  | No. of units:        | Class:        | Price/unit: $      |
| **Transferee** Full Name:  |       |
| Address:  |       |
| ACN (if a company):  |       |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |  |
| For a **redemption** of units  | No. of units:        | Class:        | Price/unit: $      |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |
| No. and Class of units held by Unitholder 1 *after* the transfer/redemption (if applicable):       |

|  |  |
| --- | --- |
| **Unitholder 3** Full Name:  |       |
| Address:  |       |
| ACN (if a company):  |       |  |
| No. and class of units held (**before** the issue/transfer/ redemption):       |
| For an **issue** of new units | No. of units:        | Class:        | Price/unit: $      |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |  |
| For a **transfer** of units  | No. of units:        | Class:        | Price/unit: $      |
| **Transferee** Full Name:  |       |
| Address:  |       |
| ACN (if a company):  |       |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |  |
| For a **redemption** of units  | No. of units:        | Class:        | Price/unit: $      |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |
| No. and Class of units held by Unitholder 1 *after* the transfer/redemption (if applicable):       |

**Change Of Unitholding -** Unit Issue,

Transfer and/or Redemption

**Section C: Unitholder Details continued**

|  |  |
| --- | --- |
| **Unitholder 4** Full Name:  |       |
| Address:  |       |
| ACN (if a company):  |       |  |
| No. and class of units held (**before** the issue/transfer/ redemption):       |
| For an **issue** of new units | No. of units:        | Class:        | Price/unit: $      |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |  |
| For a **transfer** of units  | No. of units:        | Class:        | Price/unit: $      |
| **Transferee** Full Name:  |       |
| Address:  |       |
| ACN (if a company):  |       |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |  |
| For a **redemption** of units  | No. of units:        | Class:        | Price/unit: $      |
| Units are [ ]  Fully paid  | [ ]  Partly Paid to $       per unit |
| No. and Class of units held by Unitholder 1 *after* the transfer/redemption (if applicable):       |

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