Important: Please download to your desktop first and then open in adobe reader. Do not complete in browser.

Phone 1300 226 226
Email team@cosecpartners.com.au

DEED OF CONFIRMATION – ORDER FORM*

***Where the existing Discretionary Trust Deed is unable to be located**

NAME OF TRUST AND STATE OF OPERATION:

……..……..…….…….....Stamp Duty State/Territory: …….....

EFFORTS MADE TO LOCATE THE LOST TRUST DEED:

Usually copies of lost deeds may be found in files held by accountants, lawyers or banks. It is always better to have a copy of the deed than to try to confirm the terms of a lost one. We need to ensure that you have asked all relevant people for a copy of the deed, so the answer to each of the following questions needs to be Yes.

- ☐ You have contacted all prior solicitors/accountants that have acted on behalf of the client and may have come into contact with the Trust Deed
- ☐ You have contacted the current accountants that handles the tax returns for the Trust
- ☐ You have reviewed the tax returns for the Trust and the beneficiaries to determine who are the beneficiaries
- ☐ You have attempted to locate all minutes of the Trustees
- ☐ You are not aware of any updates or variations to the Trust
- ☐ You or the client did not have any other Trusts established at the same time (if they did, we could assume that the standard terms were similar)
- ☐ You have contacted the bank(s) at which the Trust has an account and they do not hold a copy of the trust deed
- ☐ You have been unable to locate a copy of the stamp duty assessment or indeed a cheque butt for the duty that was paid

If you have a copy of a deed for a Trust that was established at the same time as the lost Trust Deed, please include a copy with this order for the Deed of Confirmation) Yes / No

DATE THE EXISTING TRUST DEED WAS SIGNED: …../…../…….

TRUSTEE: Name: ……..… and ……..……..…..…… (if jointly)

Address: …….. ……

……. …….

IF CORPORATE TRUSTEE: Name…….ACN:……...

Directors Name(s) if Corporate Trustee: …….....

……..……..

APPOINTOR: (Please provide name and address)

……and…….……(if jointly)

…… ……..……..…

Upon appointor's death: ……..……and……(if jointly)

…… ……..……..…

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PRIMARY BENEFICIARIES:

Name: ……ACN: ……

Address: ……

and Name: ……ACN: ……..

Address: ……

and Name: ……ACN: ……..

Address: ……

and Name: ……ACN: ……..

Address: ……

To CoSec Partners: You are appointed to act as our agent to procure a Trust Deed and ancillary legal documentation from a solicitor, the particulars for such trust deed and legal documents being set out hereinbefore. In consideration for you acting as our agent, payment of solicitors costs, attending to compilation of materials in a register and delivery of same we shall pay you such amounts as agreed.

Disclaimer – We do not provide legal, accounting, financial or stamp duty advice and therefore take no responsibility for your taxation, legal or other liabilities which may arise from the work we perform on your instructions. We urge you to first obtain legal and accounting advice in relation to your affairs and in particular this transaction.

APPLICANT DETAILS (FIRM):…….....

CONTACT PERSON: ……PH:…….……FAX:…….....

FULL ADDRESS:……..

EMAIL: ……..…….. SIGNATURE:…… DATE: …../…../…….

Please indicate how you would like to receive the documents

☒ **Electronic Delivery - PDF by email, or**
☐ **Electronic Delivery plus hard copy printed, bound and delivered**

For pricing, please refer to our online price list (Click Here)

PAYMENT REQUIRED WITH ORDER **Amount $**814.....

☐ **Direct Deposit / EFT**

Bank: ANZ Banking Group BSB: 015-056 Account: 225324305 Ref: Please use name of Trust

☐ **MasterCard** ☐ **Visa**

Card Number:……Expiry Date:…… CCV ……

Name of Cardholder:…….....Signature……..

Please email completed form to team@cosecpartners.com.au