ABBOTS
INCORPORATION SERVICES

UNIT TRUST CHECK LIST

TRUST DETAILS

- ☐ What is your proposed Trust name?
- ☐ What jurisdiction is the Trust Deed going to be registered in?
  This will be the state your Deed will be stamped in (if stamping is required within the unit holdings).
- ☐ Is the trust Fixed or Hybrid?
  Fixed trust means there is fixed beneficial interests.
  Hybrid Trusts enable the Trustees discretion when distributing income or capital to unit holders.
- ☐ What is the address of the Trust?

TRUST ADDRESS

- ☐ What is the address of the Trust?
- ☐ Name and address

TRUST STRUCTURE

Trustee(s)

- ☐ Name and address

Unit holder(s)

- ☐ Name and address

NOTES