



Trust Accounts – Individual, Joint & Company Trustees — for Formal & Informal Trusts, Superannuation Funds & Deceased Estates

Community First Credit Union Ltd ABN 80 087 649 938

Date: _____

Please open a trust account in the Trust Name below: *Account Number* _____

1) For a Sole Trustee Account

(1) Surname	_____
First Name	_____
Membership No.	_____
<i>Sign</i>	

2) For a Joint Trustee Account

(1) Surname	_____
First Name	_____
Membership No.	_____
<i>Sign</i>	

(2) Surname _____

First Name _____

Membership No. _____

Sign

3) Joint Account Method of Operation

Any One to Sign

All parties to sign

Other (specify) _____

4) For a Company Trustee

Company Trustee	_____
Membership No.	_____

Sign

I/we make the following disclosures about the trust:

5) Trust Name

Full name of trust - e.g. Smith Family Trust _____

Name of deceased estate (Please bring Probate, Letters of Administration or the will, or a copy of any of them, for us to sight) _____

Trust or Estate
Tax File Number
or ABN _____

6) Beneficiary's Details – for more than 5 beneficiaries, attach a separate list
[Not required for Superannuation trusts registered with the Australian Taxation Office]

1st Beneficiary

(1) Full name of beneficiary, person subject to Guardianship Order or infant

Residential Address

2nd Beneficiary

(2) Full name of beneficiary, person subject to Guardianship Order or infant

Residential Address

3rd Beneficiary

(3) Full name of beneficiary, person subject to Guardianship Order or infant

Residential Address

4th Beneficiary

(4) Full name of beneficiary, person subject to Guardianship Order or infant

Residential Address

5th Beneficiary

(5) Full name of beneficiary, person subject to Guardianship Order or infant

Residential Address

7) Details of the Class of Beneficiaries for Discretionary Trusts – if unsure, check details with your accountant

If the trust is a discretionary trust,
give details of the class of
beneficiaries

Office Use Only:

- Customer Identification Procedure – Trustee carried out & recorded
- For Deceased Estates – copy of Will, Probate or Letter of Administration provided and filed in member's file
- For ATO registered superannuation funds – copy of the ATO Business Register Cert. or ABR search obtained & filed

Record details of Probate, Letters of Administration or Guardianship Order

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