



CALIYAN ASSOCIATES

SETUP INFORMATION FOR COMPANY/ TRUST

1. Details of Individuals/company/unit holders

	Entity 1	Entity 2	Entity 3	Entity 4
Name				
Address				
Email/Phone				
Date of Birth				
TFN				
City of Birth*				
* only necessary for Directors				
Select Roles				
Trustee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beneficiary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Director	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public Officer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Co. Secretary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shareholder	<input type="checkbox"/> # of shares ____	<input type="checkbox"/> # of shares ____	<input type="checkbox"/> # of shares ____	<input type="checkbox"/> # of shares ____

2. What would you like to set up? (please mark or circle)

Family or Unit Trust (Indiv Trustees)	Family or Unit Trust (Corporate Trustee)	Proprietary Company	Not-For-Profit
Includes : - Legal Trust Deed - Ancillary Documents - Stamp Duty (VIC = \$200) - ABN/TFN/GST/PAYG registration as required - Soft copies of all setup documents for your records NOTE: This package also applies if you have a company already set up that you want to appoint as Trustee.	Includes : - Legal Trust Deed - Ancillary Documents - Stamp Duty (\$200) - Legal Company Constitution - Certificate of Registration (ASIC) - Ancillary Documents - ASIC fee (\$463.00) - ABN/TFN/GST/PAYG registration as required - Soft copies of all setup documents for your records.	Includes : - Legal Company Constitution - Certificate of Registration (ASIC) - Ancillary Documents - ASIC fee (\$469.00) - ABN/TFN/GST/PAYG registration as required - Soft copies of all setup documents for your records	Includes : - Legal Trust Deed - Ancillary Documents - Stamp Duty (\$200) - ABN/TFN/GST/PAYG registration as required - Soft copies of all setup documents for your records
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
\$550.00 incl GST	\$1350.00 incl GST	\$900.00 incl GST	\$880.00 incl GST



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3. Name details

Proposed name of Trust : _____

If you have a Company (Trustee) already, name : _____

ACN :

Proposed Name of Company : _____

Alternative 1 name of Company : _____

Alternative 2 name of Company : _____

Business and Postal Address (copy from 1, 2, 3, 4 or other): _____

4. If you want to register a Trading Name, please supply the name

- 1 Year Registration : **\$88.00** (includes ASIC Fee)
- 3 Year Registration : **\$132.00** (includes ASIC Fee)

5. Share/ Unit Holding structure

If Trust, settled sum (normally, \$10) : \$ _____ .00

If Unit Trust : No of Units on issue _____ ; @ \$ _____ .00 per units
(Please note, the number of units on issue have to total to the sum of all units at Question 1.)

If Company : No of Shares on issue _____ ; @ \$ _____ .00 per share
(Please note, the number of shares on issue have to total to the sum of all shares at Question 1.)

6. If you have more than 4 unit holders or share holders, please attach a separate sheet to this document.

7. Declaration

I hereby declare that Caliyan Associates have not provided me with any financial advice whatsoever on the suitability of setting up this Company and/or Trust structure and are acting on our instructions solely to carry out the setting up of the same.

Name of applicant : _____

Signature : _____

Date: _____