



<b>THE COMPANY PEOPLE PTY LTD</b> <i>Tel: 1800 039 061</i> Website: <a href="http://www.thecompanypeople.com.au">www.thecompanypeople.com.au</a>	<b>SUITE 8B, LEVEL 2/221 QUEEN STREET MELBOURNE VICTORIA 3000</b> <i>Fax: 1800 633 644</i> email: <a href="mailto:admin@thecompanypeople.com.au">admin@thecompanypeople.com.au</a>
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<b>FIRM/PERSON PLACING ORDER</b>	
<b>Firm Name:</b>	<b>Contact Name:</b>
<b>Address:</b>	
<b>Phone:</b>	<b>Fax:</b>

A Testamentary Trust is a Trust that incorporates a Will. This order form is divided into four sections (please complete all sections). They are:

- SECTION A: PERTAINING TO BOTH THE WILL AND TRUST
- SECTION B: PERTAINING TO THE WILL
- SECTION C: PERTAINING TO THE TRUST
- SECTION D: PAYMENT DETAILS

**SECTION A: PERTAINING TO BOTH THE WILL AND TRUST**

State/Territory of Jurisdiction \_\_\_\_\_

**TESTATOR**

<b>Name of Testator</b>	_____
<b>Residential Address</b>	_____ _____
<b>Occupation</b>	_____

**SECTION B: PERTAINING TO THE WILL**

**FIRST EXECUTOR**

<b>Name of first Executor</b>	_____
<b>Residential Address</b>	_____ _____

**SECOND EXECUTOR (Optional)**

<b>Name of second Executor</b>	_____
<b>Residential Address</b>	_____ _____

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**BENEFICIARIES OF THE WILL**

1 Full name \_\_\_\_\_ 3 Full name \_\_\_\_\_  
2 Full name \_\_\_\_\_ 4 Full name \_\_\_\_\_

**SPECIFIC BEQUESTS TO BENEFICIARIES OF THE WILL (Optional)**

Bequest to Beneficiary 1 \_\_\_\_\_  
Bequest to Beneficiary 2 \_\_\_\_\_  
Bequest to Beneficiary 3 \_\_\_\_\_  
Bequest to Beneficiary 4 \_\_\_\_\_

**NOMINATED GUARDIAN OF DEPENDANTS (Optional)**

Full name \_\_\_\_\_

**SECTION C: PERTAINING TO THE TRUST**

**FIRST TRUSTEE**

Same as First Executor ? :                      **YES / NO**

If 'NO':

Name of first Trustee	_____
Residential address	_____ _____

**SECOND TRUSTEE (Optional)**

Same as Second Executor ? :                      **YES / NO**

If 'NO':

Name of second Trustee	_____
Residential Address	_____ _____

**SPECIFIED BENEFICIARIES OF THE TRUST (Optional)**

Same as for the Will ? :    **YES / NO**

If 'NO':

1 Full name _____	2 Full name _____
2 Full name _____	4 Full name _____

