



Brief description of the property and improvements:

(age, nature of building & improvements, made from timber/brick/brick veneer, number of bedrooms (if a residence) etc):

**D. THE TRUST:**

Trust/Fund Name:

Trust/Fund ABN:

Provide details of current Trustee(s) of the Trust including name(s) and address(es). ACN (if applicable)

Provide details of New Trustee(s) including full name(s) and address(es). If Trustees are individuals, provide dates of birth. ACN (if applicable)

**E. PROPERTY TRANSFER INFORMATION:**

What proportion of the property is being transferred – whole or only part of it?

If part only, what proportion?

This might be applicable where Retired/Retiring Trustee only holds part of the property in a Trustee capacity

Name and address of property manager (if applicable)

Not applicable

Address to which all future notices concerning the property are to be sent (you, your property manager or some other person if so desirable):

For Minutes of Meeting purposes, the date and address where and when the parties resolved to transfer the property

Date

*This past or future date will be the date of the transfer.*

DD/MM/YYYY

Address:

Has any person paid any amount to the Retired/Retiring Trustee or to any other person in respect of the transfer?

No

Yes

If Yes, provide details:

Is the transfer part of a sale or other arrangement under which there exists consideration or value given for the transfer?

No

Yes

If Yes, provide details:

**F. MORTGAGES, CHARGES AND CAVEATS:**

Is there a registered charge on the Personal Property Securities Register?	No	Yes
If Yes, has the bank/lender agreed to release the property from the charge?	No	Yes
Is there a mortgage (whether registered or unregistered) affecting the property?	No	Yes
If Yes, has the bank/lender agreed to the change of Trustee?	No	Yes
Is there a caveat affecting the property?	No	Yes
If Yes, has the caveator agreed to the change of Trustee?	No	Yes

Provide name, address and contact details for bank/lender or caveator

**G. DOCUMENT DELIVERY:**

Prepared documents are to be sent by:                      email:                      mail:                      express post:  
Additional Fee of \$13.00 applies

**H. COMPLETED INSTRUCTIONS:**

Please forward completed instructions to MJHC Legal:

**email:** mjhc@mjhlegal.com

**fax:** 03 9543 5133

**mail:** PO Box 412, Mount Waverley VIC 3149

Print and review your instructions before submitting and retain printed copy for your file. Adobe Reader will not allow you to save the data in this form. The Email button will forward your completed Instruction Form to MJHC Legal, Solicitor. The Reset button will clear all data in the form.

In submitting the completed Instruction Form, the person described in Part A authorises MJHC Legal to prepare the transfer documents and agrees to pay the Fees payable for those packages. You understand that typing/spelling errors or incorrect information given are your responsibility.

**I. MISSING DOCUMENTS:**

If you have NOT checked a box that a document is 'Enclosed', unless you have checked that a document is 'Already Provided' or 'Not Applicable' , you will need to provide copies in order for the property transfer documentation to be completed by MJHC Legal.

In assessing whether a transfer of property from the retired Trustee to a new Trustee is eligible for duty exemption, the State Revenue Office needs to sight copies of signed and dated Deeds of Establishment/Settlement, Deeds of Amendment and any Deeds of Trustee Appointment. If there are any missing documents, it will be necessary for MJHC Legal to prepare additional supporting material and an additional fee will apply.

Liability limited by a scheme approved under Professional Standards Legislation