

**THE COMPANY PEOPLE**

Transfer of Units in a Unit Trust – Page 1 of 2

<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>PO Box 960, Torquay 3228</b>  email: <a href="mailto:admin@thecompanypeople.com.au">admin@thecompanypeople.com.au</a>
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<b>FIRM/PERSON PLACING ORDER FOR SECRETARIAL SERVICES</b>	
<b>Firm Name:</b> <b>Address:</b> <b>Phone:</b>	<b>Contact Name:</b> .....

**TRANSFER OF UNITS IN A UNIT TRUST**

**If there is insufficient space in any section of the form, you may photocopy the relevant page(s) and submit as part of this order.**

**Name of Trust:** .....

**Details of Trustee(s)**

1. Name ..... Address: ..... ..... ACN (if Company): .....
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2. Name ..... Address: ..... ..... ACN (if Company): .....
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**1. Details of Unit Holding to be Transferred**

1. Name of <b>Current</b> Unit holder (Transferor) ..... Address: ..... ..... ACN (if Company): ..... Number of Units: .....                      Current Class of Units: .....
2. Name of <b>Receiving</b> Unit holder (Transferee) ..... Address: ..... ..... ACN (if Company): ..... Number of Units: .....                      Current Class of Units: .....

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### 2. Details of Unit Holding to be Transferred

3. Name of <b>Current</b> Unit holder (Transferor) .....	
Address: .....	
.....	
ACN (if Company): .....	.....
Number of Units: .....	Current Class of Units: .....
4. Name of <b>Receiving</b> Unit holder (Transferee) .....	
Address: .....	
.....	
ACN (if Company): .....	.....
Number of Units: .....	Current Class of Units: .....

**Please list accompanying documentation (if applicable)**

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**Comments / Special Requirements**

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**By signing below, I acknowledge that both ‘The Company People Pty Ltd’ and ‘Kinross-Smith and Associates Lawyers’ provide the required documentation for the service requested in good faith. However, it is the responsibility of the Trustee to ensure that the amendment is executed in accordance with the requirements of the Trust, and the relevant law. This includes any amendment that may have an effect, intended or otherwise, on the Capital Gains Tax, Stamp Duty (or other excise) position of either the Trust itself, or assets held within the Trust.**

Print Name(s)	Signature(s):	Date:
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