

Family Trust Update – Beneficiary Exclusion
Checklist

#### Start building your document for free:

1. Select START FOR FREE - the building process is free: <https://legalconsolidated.com.au/family-trust-update-exclude-a-beneficiary/>
2. Answer the questions. Read the hints and watch the training videos. Educate and be empowered.
3. Telephone the law firm for help answering the questions.
4. Select Lock and Build and enter your credit card details.
5. Within seconds, you get our cover letter and the finished document.

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| **Trust Details**• Name of your Family Trust• Family Trust Address• Date the Original Trust Deed Signed |  |
| **Excluded Beneficiary**• Excluded Beneficiary Name(ACN if a company)• Excluded Beneficiary Address• Date the Original Trust Deed Signed |  |
| **Settlor**• Settlor Name• Settlor Address |  |
| **Outgoing Appointors (if any)**• Outgoing Appointor Name(ACN, if a company)Outgoing Appointor Address |  |
| **Remaining Appointors (if any)**• Remaining Appointor Name(ACN, if a company)Remaining Appointor Address |  |
| **New Appointors (if any)**• New Appointor Name(ACN, if a company)New Appointor Address |  |
| **Backup Appointors (if any)**• Backup Appointor Name(ACN, if a company)Backup Appointor Address |  |
| **Outgoing Trustees (if any)**• Outgoing Trustee Name(ACN, if a company)Outgoing Trustee Address |  |
| **Remaining Trustees (if any)**• Remaining Trustee Name(ACN, if a company)Remaining Trustee Address |  |
| **New Trustees (if any)**• Remaining Trustee Name(ACN, if a company)Remaining Trustee Address |  |



