

NEW CLIENT DETAILS – TRUST

Trust Name	
Trading Name if different to trust name	
Trustee's Name	
Australian Business Number (ABN) <i>if applicable</i>	
Tax File Number (TFN)	
Postal Address	
Business Address	
Telephone Number	
Fax Number	
Mobile Number	
Email Address	
Trustee company Director details <i>If the trust has a corporate trustee, for directors who are not clients of Catalyst Financial directly, please provide their names and Director ID (if they have one)</i>	<p>Director name: Director ID: DIR 036 _ _ _ _ _</p> <p>Director name: Director ID: DIR 036 _ _ _ _ _</p> <p>Director name: Director ID: DIR 036 _ _ _ _ _</p> <p>Director name: Director ID: DIR 036 _ _ _ _ _</p>
Current Accountant's Name	
Current Accountant's Business Name	

Catalyst Financial Pty Ltd - Strategic Accountants

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 Suite 5.01, 655 Pacific Highway, St Leonards NSW 2065 PO Box 333, St Leonards NSW 1590
www.catalystfin.com.au

Liability limited by a scheme approved under Professional Standards Legislation

Current Accountant's Postal Address	
Current Accountant's Email Address	

Please provide the following documents:

1. Copy of the signed trust deed
2. Copy of the most recent annual financial statements and trust income tax return

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