



Partial vesting of a discretionary trust

Questions to determine eligibility to self-assess the transaction

1	Is this transaction a partial vesting of a discretionary trust?	Yes <input type="checkbox"/>
		No <input type="checkbox"/> <i>not eligible for self assessment</i>
2	Does the transferor currently hold the property as trustee of a discretionary trust?	Yes <input type="checkbox"/>
		No <input type="checkbox"/> <i>not eligible for self assessment</i>
3	Do you have a copy of the duty endorsed agreement and/or declaration of trust which evidences the property being acquired by the trustee as trustee of the discretionary trust?	Yes <input type="checkbox"/>
		No <input type="checkbox"/> <i>not eligible for self assessment</i>
4	Was the transferee listed as a beneficiary of the trust or described as a member of a class of beneficiaries at the time the discretionary trust acquired the property?	Yes <input type="checkbox"/>
		No <input type="checkbox"/> <i>not eligible for self assessment</i>
5	Is consideration paid for the transfer or agreement to transfer?	Yes <input type="checkbox"/> <i>not eligible for self assessment</i>
		No <input type="checkbox"/>
6	Will any liabilities be assumed or debt extinguished for the transfer or agreement to transfer?	Yes <input type="checkbox"/> <i>not eligible for self assessment</i>
		No <input type="checkbox"/>
7	Is the transferee an individual (natural person)?	Yes <input type="checkbox"/>
		No <input type="checkbox"/> <i>not eligible for self assessment</i>
8	Does the trustee have a power of appointment over the property?	Yes <input type="checkbox"/>
		No <input type="checkbox"/> <i>not eligible for self assessment</i>
9	Did the trustee have a power of appointment at the time the discretionary trust acquired the property?	Yes <input type="checkbox"/>
		No <input type="checkbox"/> <i>not eligible for self assessment</i>
10	Does the transferee intend to hold the property as agent, trustee or otherwise on behalf of any other person?	Yes <input type="checkbox"/> <i>not eligible for self assessment</i>
		No <input type="checkbox"/>

Name of trustee(s) as transferor(s):	
Name of discretionary trust:	
Name of beneficiary(s) as transferee(s):	
Beneficiary(s) relationship (i.e. Primary/General beneficiary):	
Signature of taxpayer(s)/agent:	