

## EXISTING FUND APPLICATION FORM

Fund Name	_____		
Postal Address	_____		
Fund's ABN	Fund's TFN	_____	
Contact Name	Telephone (H)	_____	
Mobile	Telephone (W)	_____	
Email	Fax	_____	

### MEMBER AND/OR INDIVIDUAL TRUSTEES

Individuals (attach separate sheet if more than two)

Title	_____	Title	_____
Full Name	_____	Full Name	_____
Address	_____	Address	_____
DOB	_____	DOB	_____

Indicate with a cross  if each person is a member and/or a trustee.

Member     Trustee                       Member     Trustee

Corporate trustee (if applicable)

Company Name	_____
Registered address	_____
ACN/ABN/TFN	_____

### PREVIOUS ADMINISTRATION

Name of firm	_____	Contact:	_____
Postal Address	_____		
Phone	Email	_____	

### CONTINUING ADMINISTRATION

Superannuation Services Pty Ltd is to be appointed administrator for this SMSF.

### AUTHORITY TO PROCEED

Please proceed with the administration of the SMSF for the financial year \_\_\_/\_\_\_/\_\_\_ onwards.

We/I have been supplied with Superannuation Services Pty Ltd fee schedule. We/I understand that Superannuation Services Pty Ltd is not a licensed investment advisor and has not provided any investment advice in relation to this SMSF.

Signed: \_\_\_\_\_  
Trustee/Director

Signed: \_\_\_\_\_  
Trustee/Director

Referred by	Phone
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## DOCUMENT CHECK LIST

The following documents are required to complete appointment of administration:

- Copy of current trust deed including any deeds of variation
- Current investment strategy
- Previous financial accounts including tax return & member statements
- Fund's Tax File Number (TFN ) & Australian Business Number (ABN)
- Members' Tax File Numbers
- Corporate trustee's Certificate of Registration, if applicable
- ASIC company details (including all office holders)
- Any setup documents, if available
- Insurance policy documentation, if applicable
- Binding death benefit nominations, if applicable
- Pension setup documents, if applicable
- Eligible service date of member, if available
- Copies of meeting minutes, if available
- Copies of any ETP's and rollover documentation, if available
- Investment register detailing number of units/shares, purchase date and purchase cost per parcel
- Tax deferred details for property investments, if applicable