

NEW SMSF APPLICATION FORM

Proposed Fund Name

Postal Address

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 to be a member and/or a trustee.

Member

Trustee

Member

Trustee

Would you like us to set up the company Yes No. If yes please provide preferred company name.

Corporate trustee (if applicable)

Company Name

Registered address

ACN/ABN/TFN

Director 1

Place of Birth

Occupation

Director 2

Place of Birth

Occupation

NB: All members must be directors and all directors must be members.

No member is allowed to be an employee of another member unless they are related

ELIGIBILITY FOR TRUSTEESHIP

Are all trustees/directors eligible to hold the position of trustee/director in accordance with SIS Act Sec 120?

YES/NO

An individual is not eligible if:

- (a) At any time: (i) the individual was convicted of an offence (in respect of dishonest conduct) against or arising out of law of the Commonwealth, State, a Territory or a foreign country; or (ii) a civil penalty order was made in relation to the person; or (b) the person is an insolvent under administration.

CONTINUING ADMINISTRATION

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

AUTHORITY TO PROCEED

Please proceed with the SMSF set-up. 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 setting up this SMSF.

Signed: _____

Trustee/Director

Signed: _____

Trustee/Director

Referred by

Phone

Please fax, email or post completed SMSF Application form to;

Post: Superannuation Services Pty Ltd, PO Box 7284, East Brisbane QLD 4169

Email: enquiries@superannuationservices.com.au

Fax: 07 3899 5638



ESTABLISHMENT OF A NEW FUND

We arrange all the paperwork that is necessary to get your Fund up and running. The trust deed is a key part of the establishment service and has been specifically developed for SMSFs to accommodate all of the latest SMSF and estate planning strategies. Our trust deed, which is issued by a national legal firm, allows for members in either pension or accumulation phase, or a mixture of both. Upon application of a new Self Managed Super Fund, Superannuation Services will provide:

- Two bound copies of trust deed (issued by national legal firm)
- One unbound copy of trust deed
- ATO original advices for TFN and ABN
- On-line GST registration, if applicable
- Member application(s)
- Nominated dependant(s)
- Product disclosure statement for new member(s)
- Trustee's declaration and consent to act form
- Proposed roll-over form
- Minutes of inaugural meeting
- Pro-forma investment strategy
- On-line election to become a regulated super fund
- Self managed super fund trustee declaration(s)