



# Instructions for establishing LRBA – Related Party Loan Agreement

## Your details

Name

Date

Organisation

ACN/ABN

Delivery  
Address

Phone

Email

Your Ref No.

## Order Instructions

Please:

- **complete** the **order form**; and
- **forward** to us a copy of the **SMSF Deed** and any **Variations** that have been made to [info@documentshop.com.au](mailto:info@documentshop.com.au).
- **We will provide you with a quote before proceeding.**

## Loan details

- Lender
  - Full Name
  - Address
- SMSF Trustee
  - Full Name
  - Address
- SMSF Name
- SMSF Custodian Company
  - Full Name
  - Address
- Custody Trust Name
- Loan Amount
- Interest Rate - RBA indicator lending rates or other?
- Interest fixed (up to 5 years) or variable?
- Date of Loan
- Term of Loan (max 15 years)

- Security - Registered mortgage or other?
- Repayments - Principal and interest payable monthly or other?
- Asset funds are being used to acquire (e.g. property address and CT Reference)
- Default Interest Rate
- Settlement Date for purchase of asset
- Jurisdiction (State or Territory)

## Logo

Would you like us to include your logo on the documents?

- Yes - please e-mail to us your logo for insertion
- No - we will include the Document Shop logo

## Acceptance of terms and conditions

By ticking this box, I/we acknowledge that I/we have read and agree to the Document Shop Pty Ltd *terms and conditions and acknowledgement* [available on our website at [www.documentshop.com.au](http://www.documentshop.com.au) or contact us at [info@documentshop.com.au](mailto:info@documentshop.com.au) and we will e-mail or post a copy to you].

Please return this order form to [info@documentshop.com.au](mailto:info@documentshop.com.au).

**We will provide a quote to you before proceeding.**

Your order will be processed once payment has been received.