



Instructions for establishing a Self Managed Superannuation Fund

Your details

Name

Date

Organisation

ACN/ABN

Delivery
Address

Phone

Email

Your Ref No.

Delivery options

(please tick the appropriate box)

DIY Print - Please deliver all documents to me via e-mail **\$319***

Hard copy - Please print, bind and deliver all documents to me in a binder via express post **\$363***

***Prices are GST inclusive. Prices do not include any stamp duty that may be payable.**

Name of fund

Commencement date

Members

[Maximum of four]

Name

Address

Date of birth

What you need to know

No member may be an employee of another member, unless they are ** relatives*.

** relatives* include, amongst others, a parent, child, grandparent, sibling, aunt, uncle, spouse and former spouse.

Trustee(s) details

(Individual(s) or Corporate Trustee) [please tick the appropriate box]

Individuals Full Name/s:

Address/es:

Company Name:

ACN:

Registered Office Address:

Name of each director:

Meeting Address

What you need to know:

Sole member fund

If the trustees of the fund are to be individuals, there must be two trustees – the sole member and a non-member (the sole member must not be an employee of the other trustee unless they are ** relatives*).

If the trustee of the fund is to be a corporation, the sole member must be:

- the sole director of the corporation; or
- one of two directors (the sole member not being an employee of the other director, unless they are ** relatives*).

Multiple member fund

If the trustees of the fund are to be individuals, each trustee must be a member of the fund (and vice versa).

If the trustee of the fund is to be a corporation, each director must be a member of the fund (and vice versa).

No member of the fund may be an employee of another member, unless they are ** relatives*.

** relatives* include, amongst others, a parent, child, grandparent, sibling, aunt, uncle, spouse and former spouse.

Contributing Employer

(if any)

Name	ACN	Address
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Which jurisdiction's laws will apply to the SMSF ?

(State or Territory)

Stamping

The SMSF Trust deed may be required to be stamped in the relevant jurisdiction. Please advise if you require our assistance with this process and we can provide you with a quote to do so.

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

Other requirements

(if any)

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