

Form Type: SMSF ONLY – Existing Trustee – Corporate or Individual

Use this Form where you wish to order a new SMSF Trust only and you already have a Company that you intend to use as the Corporate Trustee of the Fund OR you are using Individual Trustee/s of the Fund.

To SMSF Loans Pty Limited: You are appointed to act as our agent to procure Trust Deeds and ancillary legal documentation from a solicitor, the particulars for such Trust Deeds and legal documents being set out hereunder. This authority for creation of an agency extends to all agents of SMSF Loans Pty Limited. In consideration for you acting as our agent we shall pay you such amount as specified in your invoice prior to you commencing any work.

Signed: Dated:

Fund Name:

(Insert the Preferred Name for your new Self Managed Superannuation Fund)

Date of Documents: Leave Undated Today's Date Future Date
(Specify Date)

Delivery Details for SMSF Register:

Street Address:

Town / Suburb: State: Postcode:

Phone

Corporate Trustee Details: (Complete this section **only** if you have an existing Company that you will be using as the Corporate Trustee of the SMSF. If left blank the Persons identified below will be Individual Trustees of the SMSF)

Name of Trustee:

A.C.N.

Registered Address:

Town / Suburb: State: Postcode:

Members / Directors / Individual Trustee Details

Name: D.O.B.
(Full Legal Name)

Address:

Town / Suburb: State: Postcode:

Name: D.O.B.
(Full Legal Name)

Address:

Town / Suburb: State: Postcode:

Is this person a member of the fund? **Yes / No** (A single member fund may have two trustees/directors of trustee)

Does the fund have anymore members? **Yes / No**

If Yes, please attach a Superannuation Fund Additional Instructions sheet (Next Page)

Fund Name:

Name:	D.O.B.
(Full Legal Name)	
Address:	
Town / Suburb:	State: Postcode:

Name:	D.O.B.
(Full Legal Name)	
Address:	
Town / Suburb:	State: Postcode:

NOTE: SMSF Loans Offers a FREE service to register your new SMSF for an ABN and TFN. If you wish to utilise this service please complete page 3.

Self Managed Superannuation Fund - Trustee & Member Requirements

	Single Member	2 - 4 Members
Corporate Trustee	Member must be a director Can have 2nd director but not compulsory 2nd director can't be an employer of the member unless the 2nd director is related to member	All members must be directors All directors must be members No member can be an employee of another member unless the members are related
Individual Trustees	Must have two individual trustees Member must be one of the trustees 2nd trustee can't be an employer of the member unless the 2nd trustee is related to the member	All members must be trustees All trustees must be members No member can be an employee of another member unless the members are related

For more information visit www.ato.gov.au/super

Section 17A of the Superannuation Industry (Supervision) Act 1993 provides the definition of a Self Managed Superannuation Fund

Please send this order to: SMSF Loans Pty Limited

Fax: 02 4958 2921

Email: info@smsfloan.com.au

Post: PO Box 109 Boolaroo NSW 2284