

SMSF Establishment

*The information requested on this form is required to establish your SMSF. Please complete all applicable details as accurately as possible. If you have any questions, please contact us.

Chosen Name of the SMSF to be established

If your SMSF is going to use a company as trustee, please provide the preferred company name:

Preferred Name of the Trustee Company (e.g. My Company Pty Ltd)

Enter the names and details of all individuals who will be members of the fund:

	Member/Director 1	Member/Director 2	Member/Director 3	Member/Director 4
Title				
Given Names				
Last Name				
Home Address				
Mailing Address				
Contact Phone				
Mobile				
Email				
Gender				
Date of Birth				
Place of Birth (Town / City)				
State of Birth (or Overseas)				
Country of Birth (if not Australia)				
Occupation				
Tax File Number				
Are you an Australian resident?				

SMSF Establishment Fees	I agree to the once off set-up fee of \$4000 + GST and the ongoing management fee of \$181/m + GST payable from your SMSF.
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SIGNATURES

Client 1	
Client 2	
Note: *Any change of name, *provide birth and divorce certificates	*DATE: I/WE confirm that all the info provided above is correct and accurate