

Campaign Code (if applicable)

## THE SERVICE

### About the service

Our Fund Establishment only service includes everything you need to get your SMSF up and running and includes:

- SuperConcepts comprehensive and highly flexible SMSF Trust Deed
- Member packs (including application forms, pro-forma Product Disclosure Statements and binding death nomination forms) and
- Relevant letters, minutes & templates (including a sample fund investment strategy)

If you require a Sole Purpose SMSF Trustee Company to be incorporated, SuperConcepts can facilitate this process for you. Simply complete the relevant sections on the application form and pay the additional fee.

If you require annual accounting, regulatory and ATO compliance services, please visit [superconcepts.com.au](http://superconcepts.com.au)

### For more information

If you have any questions about the service or completing this form

Visit our website [www.superconcepts.com.au](http://www.superconcepts.com.au)

Call us on 1300 023 170

Email us at [trusteeservices@superorganised.com.au](mailto:trusteeservices@superorganised.com.au)

## APPLYING FOR THE SERVICE

### Complete this form

- ▶ Please write clearly and use black pen to complete the form.
- ▶ Please mark boxes like this  with a ✓ or ✗.
- ▶ Where you see a box like this  ▶ skip to the section shown.
- ▶ Please ensure that you complete all required sections, provide all supporting documents and have signed and dated this form.

### Return this form

By mail: SuperConcepts

By fax: 1300 660 528

PO Box R476, Royal Exchange NSW 1225

By email: [trusteeservices@superorganised.com.au](mailto:trusteeservices@superorganised.com.au)

## 1. FUND DETAILS

Any name can be used, but it is best to keep it simple and concise. Please be very precise in relation to spelling and use of capital letters, abbreviations and spaces. Full stops should be avoided. It is not necessary to include 'The' as the first word of your fund name.

Fund name

Commencement date<sup>1</sup>

 /  / 

<sup>1</sup> If the fund has a Corporate Trustee this date cannot be prior to the Company incorporation date. Unless specified otherwise, the commencement date will be the date the fund is established by SuperConcepts.

## 2. FUND TRUSTEE DETAILS

▶ Individual Trustee/s - Go to Section 5

or

▶ Existing Trustee Company - Go to Section 3

▶ New Trustee Company - Go to Section 4

### 3. EXISTING FUND TRUSTEE COMPANY DETAILS

Full company name

ACN --

Please attach a copy of the current ASIC company statement to confirm Directors and registered office details.

Go to Section 5

### 4. NEW SOLE PURPOSE SMSF TRUSTEE COMPANY DETAILS

Please do not use this service if you wish to order a Company for purposes other than being a trustee of a SMSF

- It is your responsibility to ensure that your company name does not conflict with any existing company name, business name, trade mark or domain name. Please refer to the ASIC Check Name Availability Search and to IP Australia's Trade Mark On-line Search System for assistance.
- If the preferred company name is identical to that of an Australian registered business and the owner(s) of that business is one of the Directors below, the business number and registered state must be supplied in order to complete incorporation.
- The Company will be registered with ASIC as a Sole Purpose SMSF Trustee Company.
- Ordinary Shares will be issued and allocated to each Director in equal proportions.
- A Company Seal will not be issued (not required under the *Corporations Act 2001*).
- Each person must provide their written consent to act as a Director and Shareholder prior to appointment (provided for on this Order Form).

Preferred company name  Pty Ltd

Alternate preferred name  Pty Ltd

Registered business number  State of registration

Registered office address

Name of occupier

Principal business address

By signing, each person nominated in Section 5, consents to act as Director of the Sole Purpose SMSF Trustee Company.

### 5. FUND STRUCTURE

A self managed fund is limited to four (4) members or less and **all** members must be Trustees as individuals or as Director/s of a Trustee Company. The first named Director will be appointed as Public Officer and Secretary where a new SMSF Trustee Company is requested.

If the fund has only one member and the Trustee is **not** a company there **must be one other individual Trustee**. Alternatively, where there is a **Corporate Trustee**, a **second Director** can be appointed. This person can be a relative **or** any other person who is not an employer of the member.

#### TRUSTEE 1

Capacity  Individual Trustee or  Director of Trustee Company

Fund member  Yes or  No

Name

Gender  Male  Female

Residential address

Phone  Email

Tax File Number --

Date of birth  /  /

Place of birth City  State  Country

Signature

**Note:** A signature and place of birth is **only** required if a New Sole Purpose SMSF Trustee Company is being established in Section 4.

## 5. FUND STRUCTURE (CONTINUED)

### TRUSTEE 2

Capacity  Individual Trustee or  Director of Trustee Company

Fund member  Yes or  No

Name

Gender  Male  Female

Residential address

Phone  Email

Tax File Number --

Date of birth  /  /

Place of birth City  State  Country

Signature

X

**Note:** A signature and place of birth is **only** required if a New Sole Purpose SMSF Trustee Company is being established in Section 4.

### TRUSTEE 3

Capacity  Individual Trustee or  Director of Trustee Company

Fund member  Yes or  No

Name

Gender  Male  Female

Residential address

Phone  Email

Tax File Number --

Date of birth  /  /

Place of birth City  State  Country

Signature

X

**Note:** A signature and place of birth is **only** required if a New Sole Purpose SMSF Trustee Company is being established in Section 4.

### TRUSTEE 4

Capacity  Individual Trustee or  Director of Trustee Company

Fund member  Yes or  No

Name

Gender  Male  Female

Residential address

Phone  Email

Tax File Number --

Date of birth  /  /

Place of birth City  State  Country

Signature

X

**Note:** A signature and place of birth is **only** required if a New Sole Purpose SMSF Trustee Company is being established in Section 4.

## 6. DELIVERY – FUND ESTABLISHMENT KIT & COMPANY INCORPORATION KIT (IF APPLICABLE)

We provide an electronic copy of the kit free of charge, please indicate if you would like additional Hard Copy format.

**Hard Copy** – \$50 additional fee

## 7. FEES (prices quoted are inclusive of GST)

	Fees
Fund Establishment service	\$485
Establishing a Sole Purpose Company to act as Trustee	\$880
Optional Hard Copy delivery of documents	\$50

## 8. PAYMENT DETAILS

**Cheque**

Please enclose a cheque made payable to “**SuperConcepts Administration**”.

**Credit Card**

Type of card	<input type="checkbox"/> Mastercard	<input type="checkbox"/> Visa	Amount	\$	<input type="text"/>
Credit card number	<input type="text"/>				
CCV	<input type="text"/>	Expiry date	<input type="text"/> / <input type="text"/> / <input type="text"/>		
Name on card	<input type="text"/>				
Signature	<input type="text"/> X				

**Electronic Funds Transfer (EFT)**

Account Name: SuperConcepts  
BSB: 032-099  
Account number: 615086  
Please quote: Your Superannuation Fund Name (as detailed in **section 1**)

## 9. PRIMARY CONTACT DETAILS

These details will be used for all correspondence, contact, delivery and billing purposes.

<input type="checkbox"/> Trustee	<input type="checkbox"/> Nominated Representative e.g. Adviser (please specify)				
<input type="text"/>					
<b>Name</b>	<input type="text"/>				
<b>Company</b>	<input type="text"/>				
<b>Dealer Group</b>	<input type="text"/>				
<b>Address</b>	<input type="text"/>				
<b>Postal Address</b>	<input type="text"/>				
<b>Phone</b>	<input type="text"/>	<b>Fax</b>	<input type="text"/>	<b>Mobile</b>	<input type="text"/>
<b>Email</b>	<input type="text"/>				

## 10. CHECKLIST

Before submitting your application please ensure you have:

- Attached a copy of the current ASIC statement (if you answered "Existing Trustee Company" in **section 3**)
- Completed all trustee & member details, including signatures, if you are establishing a new Sole Purpose Trustee Company (refer to **sections 4 & 5**)
- Included payment details (refer to **section 8**)

**Important Note:** Providing incomplete details will delay the processing of your application. Please ensure that you have completed all relevant sections and provided all additional information where required.

## 11. DECLARATION

By signing below, I, on behalf of the trustees (or prospective Trustees) of the Fund:

- declare that I am authorised to make declarations on behalf of the persons (and prospective Trustees) named in this application form;
- declare that the information completed on this Application Form is complete and to the best of my knowledge, accurate and correct. To the extent that any information is subsequently identified as incorrect or found to be omitted from this Application Form, I authorise SuperConcepts to correct any errors and complete any omissions on this Application Form, following my confirmation (either orally or in writing);
- acknowledge that I have read and understood the Terms and Conditions for the Service and the Service Material, as updated from time to time and agree to be bound by them;
- have read and understood the Fee Schedule applicable for the Services, found at [www.superconcepts.com.au](http://www.superconcepts.com.au) as updated from time to time and agree to be bound by them;
- authorise the collection, use and disclosure of my personal information for the purpose of the assessment of the application and if accepted, the management and administration of services in which I have applied. I understand that unless I consent to the collection, use and disclosure of this information, SuperConcepts will not be able to process my application or deliver the relevant Service(s);
- understand that SuperConcepts may routinely disclose my personal information to third parties such as: organisations undertaking compliance functions of SuperConcepts' information; organisations maintaining SuperConcepts' information technology system; authorised financial institutions; organisations providing mailing and printing services and my nominated representative (if applicable); and,
- accept that SuperConcepts or any of its related bodies corporate may send me information about its services from time to time. I understand that I may notify SuperConcepts of my decision not to receive further information by contacting SuperConcepts directly.

Signature

X

Date

/ /

Print Name

Mailing address PO Box R476  
Royal Exchange NSW 1225  
Phone 1300 023 170  
Fax 1300 660 528  
Email [trusteeservices@superorganised.com.au](mailto:trusteeservices@superorganised.com.au)  
Website [superconcepts.com.au](http://superconcepts.com.au)



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