

Self Managed Super Fund

=FastTrack= Instruction Form

Adviser's Name: _____

Delivery Address: _____



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Instructions only accepted when completed by your Accountant or Adviser with **FULL PAYMENT.**

1. What do you want to call your Self Managed Super Fund?

| | |
|-----|---------------------|
| The | Superannuation Fund |
|-----|---------------------|

You can call the fund after your own surname.
Eg The Smith Superannuation Fund

2. Who are the Members? (only 1 – 4 members)

No member can be an employer of another member (unless related)

| | Full Name | Address |
|---|-----------|---------|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |

3. I don't want the Members to be Trustees – This is the Corporate Trustee:

| |
|------|
| ACN: |
|------|

All Directors must be Members. All Members must be Directors. If you are a single Member Fund, you can be the sole Director.

4. I am a Single Member Fund and Need to Appoint another person as Co-Trustee (this is where you are just one person and you don't want to use a company as trustee)

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| |
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You can also appoint a Corporate Trustee with you as the sole Director. Remember your co-trustee can't be your boss or your employee (unless related).

5. Cost as at 6 April 2011 - \$440

Charge my credit card

Card Type

Visa

M/Card

Card Number

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Name on Card

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Expiry

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or Cheque enclosed

I would like the deeds delivered by courier. Usually \$10 per delivery (most Perth metro areas)

Changes to these instructions incur additional costs. Our lawyers are available to provide advice at \$440 per hour. SMSF's should not be set up until the Accountant agrees to arrange the audit and compliance work and the Adviser to provide the ongoing Investment strategies