ESTABLISH FUND FORM
Download and type directly onto this order form

Fund Details

Proposed Fund Name	
SMSF Postal Address	
SMSF Physical Address	
Telephone Number	

Would you like to establish a Corporate trustee?   ☐ Yes   ☐ No

If Yes, proposed name of corporate trustee

OR

Names of individual trustees

Would you like to establish a Property trust company (optional)   ☐ Yes   ☐ No

If Yes, proposed name

Would you like to establish a Macquarie bank account (optional)   ☐ Yes   ☐ No

SMSF Primary contact

Full Name	
Company Name	
Postal address	
Telephone Number	
Email address	

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Member/Trustee/Director 1

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family Name [ ]

Given Name [ ]

Middle Name [ ]

D.O.B [ ]

Place of Birth (Suburb, City) [ ]

Country of Birth [ ]

Gender ☐ Male ☐ Female ☐ Other

Occupation [ ]

Industry [ ]

TFN [ ]

Email [ ]

Mobile [ ]

Residential Address – Member/Trustee/Director 1

No/Street [ ]

Suburb [ ]

State/Territory [ ] Postcode [ ]

☐ Trustee/Director & Member ☐ Trustee/Director Only

Has a copy of the individual's ID been provided? (front and back) ☐ Yes ☐ No

Are you an owner of a business?
If yes, please provide the name of the Business, ACN and address

[ ]

[ ]

[ ]

[ ]

[ ]

Member/Trustee/Director 2

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family Name [ ]

Given Name [ ]

Middle Name [ ]

D.O.B [ ]

Place of Birth (Suburb, City) [ ]

Country of Birth [ ]

Gender ☐ Male ☐ Female ☐ Other

Occupation [ ]

Industry [ ]

TFN [ ]

Email [ ]

Mobile [ ]

Residential Address – Member/Trustee/Director 2

No/Street [ ]

Suburb [ ]

State/Territory [ ] Postcode [ ]

☐ Trustee/Director & Member ☐ Trustee/Director Only

Has a copy of the individual's ID been provided? (front and back) ☐ Yes ☐ No

Are you an owner of a business?
If yes, please provide the name of the Business, ACN and address

[ ]

[ ]

[ ]

[ ]

[ ]

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ABN 30 157 816 272 **I** Tel 1300 364 597 **I www.smsfengine.com.au**

2 |Page

ESTABLISH FUND FORM
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Member/Trustee/Director 3

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family Name	
Given Name	
Middle Name	
D.O.B	
Place of Birth (Suburb, City)	
Country of Birth	

Gender ☐ Male ☐ Female ☐ Other

Occupation	
Industry	
TFN	
Email	
Mobile	

Residential Address – Member/Trustee/Director 3

No/Street	
Suburb	

State/Territory [   ]   Postcode [   ]

☐ Trustee/Director & Member   ☐ Trustee/Director Only

Has a copy of the individual's ID been provided? (front and back)   ☐ Yes ☐ No

Are you an owner of a business?
If yes, please provide the name of the Business, ACN and address

Member/Trustee/Director 4

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family Name	
Given Name	
Middle Name	
D.O.B	
Place of Birth (Suburb, City)	
Country of Birth	

Gender ☐ Male ☐ Female ☐ Other

Occupation	
Industry	
TFN	
Email	
Mobile	

Residential Address – Member/Trustee/Director 4

No/Street	
Suburb	

State/Territory [   ]   Postcode [   ]

☐ Trustee/Director & Member   ☐ Trustee/Director Only

Has a copy of the individual's ID been provided? (front and back)   ☐ Yes ☐ No

Are you an owner of a business?
If yes, please provide the name of the Business, ACN and address

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3 |Page

ESTABLISH FUND FORM
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Member/Trustee/Director 5

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family Name

Given Name

Middle Name

D.O.B

Place of Birth (Suburb, City)

Country of Birth

Gender ☐ Male ☐ Female ☐ Other

Occupation

Industry

TFN

Email

Mobile

Residential Address – Member/Trustee/Director 5

No/Street

Suburb

State/Territory   Postcode

☐ Trustee/Director & Member ☐ Trustee/Director Only

Has a copy of the individual's ID been provided? (front and back) ☐ Yes ☐ No

Are you an owner of a business?
If yes, please provide the name of the Business, ACN and address

Member/Trustee/Director 6

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Family Name

Given Name

Middle Name

D.O.B

Place of Birth (Suburb, City)

Country of Birth

Gender ☐ Male ☐ Female ☐ Other

Occupation

Industry

TFN

Email

Mobile

Residential Address – Member/Trustee/Director 6

No/Street

Suburb

State/Territory   Postcode

☐ Trustee/Director & Member ☐ Trustee/Director Only

Has a copy of the individual's ID been provided? (front and back) ☐ Yes ☐ No

Are you an owner of a business?
If yes, please provide the name of the Business, ACN and address

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4 |Page

Declaration

I/We agree to the release of information between SMSF Engine Pty Ltd and Sequoia Superannuation Pty Ltd, for the purpose of establishing the SMSF, establishing the Corporate Trustee (if applicable), establishing a property trust account (if applicable) and establishing a Macquarie bank account (if applicable).

I/We agree that SMSF Engine Pty Ltd may collect, use and store my/our personal information for the purpose of processing my/our Application and to provide ongoing services. This complies with the relevant laws as well as in accordance with Sequoia Superannuation Privacy Policy, a copy of which can be provided on my/our request.
Such information may include but is not limited to: Tax File Numbers (TFNs), Bank Account details, Drivers' Licence and Passport information.
I/We also understand that I/ we can request in writing this personal information that SMSF Engine Pty Ltd holds on me/us.

I/We hereby declare that the above information is true and correct at the time of completing this application form.

In the case of a new SMSF & Corporate Trustee company (if applicable), I/we instruct SMSF Engine Pty Ltd to provide the necessary documentation in order to establish the SMSF, SMSF Corporate Trustee and agree to the Establishment Fees provided to me/us.

I/We agree that in the case of an ATO Audit that either delays, rejects or withholds my ABN application, I am liable to pay the Sequoia Super Processing Fee ($550) and this will be invoiced to me personally.

I/We acknowledge that SMSF Engine Pty Ltd will register the Corporate Trustee (if applicable) and Superannuation fund with the Australian Taxation Office for the purpose of acquiring an Australian Business Number and Tax File Number (where applicable).

I/We acknowledge that SMSF Engine Pty Ltd does not provide financial advice and that I/we should seek personal financial planning advice before opening a SMSF, transferring any funds into my/our SMSF and before making any investments.

I/we understand and accept that SMSF Engine Pty Ltd accepts no responsibility for the quality and/or likely future performance of my/our Superannuation investments.

Member/Trustee/Director 1

Name

Signature

Date

Member/Trustee/Director 2

Name

Signature

Date

Member/Trustee/Director 3

Name

Signature

Date

Member/Trustee/Director 4

Name

Signature

Date

Member/Trustee/Director 5

Name

Signature

Date

Member/Trustee/Director 6

Name

Signature

Date

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