



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		
Credit Card details		
Visa	Mastercard	Amex
Cardholder Name		
Credit Card Number		
Expiry Date		CVV No.
Signature		

By signing this section, I agree for SMSF Engine owned by Sequoia Superannuation to charge my nominated credit card.



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Member/Trustee/Director 1	Member/Trustee/Director 2
Mr Mrs Miss Ms Other	Mr Mrs Miss Ms Other
Family Name	Family Name
Given Name	Given Name
Middle Name	Middle Name
D.O.B	D.O.B
Place of Birth (Suburb, City) Country of	Place of Birth (Suburb, City) Country of
Birth Gender Male Female Other	Birth Gender Male Female Other
Occupation	Occupation
Industry	Industry
TFN	TFN
Email	Email
Mobile	Mobile
Residential Address – Member/Trustee/Director 1	Residential Address – Member/Trustee/Director 2
No/Street	No/Street
Suburb	Suburb
State/Territory Postcode	State/Territory Postcode
Trustee/Director & Member Trustee/Director Only	Trustee/Director & Member Trustee/Director Only
Has a copy of the individual's ID been provided? (front and back) Yes No	Has a copy of the individual's ID been provided? (front and back)
Are you an owner of a business? If yes, please provide the name of the Business, ACN and address	Are you an owner of a business? If yes, please provide the name of the Business, ACN and address



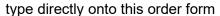
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Member/Trustee/Director 3	Member/Trustee/Director 4
Mr Mrs Miss Ms Other	Mr Mrs Miss Ms Other
Family Name	Family Name
Given Name	Given Name
Middle Name	Middle Name
D.O.B	D.O.B
Place of Birth (Suburb, City)	Place of Birth (Suburb, City)
Country of Birth	Country of Birth
Gender Male Female Other	Gender Male Female Other
Occupation	Occupation
Industry	Industry
TFN	TFN
Email	Email
Mobile	Mobile
Residential Address – Member/Trustee/Director 3	Residential Address – Member/Trustee/Director 4
No/Street	No/Street
Suburb	Suburb
State/Territory Postcode	State/Territory Postcode
Trustee/Director & Member Trustee/Director Only	Trustee/Director & Member Trustee/Director Only
Has a copy of the individual's ID been provided? (front and back) Yes No	Has a copy of the individual's ID been provided? (front and back)
Are you an owner of a business? If yes, please provide the name of the Business, ACN and address	Are you an owner of a business? If yes, please provide the name of the Business, ACN and address



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Member/Trustee/Director 5	Member/Trustee/Director 6
Mr Mrs Miss Ms Other	Mr Mrs Miss Ms Other
Family Name	Family Name
Given Name	Given Name
Middle Name	Middle Name
D.O.B	D.O.B
Place of Birth (Suburb, City) Country of	Place of Birth (Suburb, City) Country of
Birth Gender	Birth Gender
Occupation Female Other	Occupation Female Other
Industry	Industry
TFN	TFN
Email	Email
Mobile	Mobile
Residential Address – Member/Trustee/Director 5	Residential Address – Member/Trustee/Director 6
No/Street	No/Street
Suburb	Suburb
State/Territory Postcode	State/Territory Postcode
Trustee/Director & Member Trustee/Director Only	Trustee/Director & Member Trustee/Director Only
Has a copy of the individual's ID been provided? (front and back) Yes No	Has a copy of the individual's ID been provided? (front and back)
Are you an owner of a business? If yes, please provide the name of the Business, ACN and address	Are you an owner of a business? If yes, please provide the name of the Business, ACN and address





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	Member/Trustee/Director 2	
Name	Name	
Signature	Signature	
Date	Date	
Member/Trustee/Director 3	Member/Trustee/Director 4	
Name	Name	
Signature	Signature	
Date	Date	
Member/Trustee/Director 5 Member/Trustee/Director 6		
Name	Name	
Signature	Signature	
Date	Date	