

SMSF

Please complete the form below – once complete the documents will be available for download in the My Account Menu

PLEASE DO NOT USE THE '&' SYMBOL IN ANY RESPONSE

Document Name *

This will be the name of the zip file that is produced

SMSF Fund Name *

SMSF Fund Address *

24 Example St Example Town NSW 2000

Please put full address street, suburb, state and postcode

SMSF Start Date *

dd/mm/yyyy

Add up to 4 members

Members Of SMSF

Member Full Name *

Member Address *

24 Example St Example Town NSW 2000

Please put full address street, suburb, state and postcode

Member Date of Birth *

dd/mm/yyyy

⊕ Add

⊖ Remove

“ Please note:”

When adding members to the SMSF – please ensure they are also directors of the Trustee Company.
Under the SMSF regulations members and directors must be 18 years or age.
Any member of an SMSF must also be a director of the Trustee Company.

The process of adding a director to the trustee company can be done after the purchase of the SMSF deed.
(Please see your accountant)

Trustee Company or Individual Trustee Name *

We recommend that the Trustee of your SMSF is a corporate trustee – Please have a corporate trustee setup before you order this product (Please see your Accountant for further advice if needed).

Trustee ACN

Leave blank if Individual Trustee

Trustee Address *

Directors of Trustee Company or Individual Trustee Name/s

Director Name/Individual Trustee Name *

⊕ Add

⊖ Remove

Confirm your entries are correct and ready to submit? *

☐ Yes

Submit