

Form Type: Bare (Security) Trust Only

Use this Form where you already have a SMSF and wish to order a new Bare Trust only and you are using either an existing Company as the Corporate Trustee or Individual Trustee/s of the Bare Trust.

To SMSF Loans Pty Limited: You are appointed to act as our agent to procure Trust Deeds and ancillary legal documentation from a solicitor, the particulars for such Trust Deeds and legal documents being set out hereunder. This authority for creation of an agency extends to all agents of SMSF Loans Pty Limited. In consideration for you acting as our agent we shall pay you such amount as specified in your invoice prior to you commencing any work.

Signed: Dated:

Fund Name:

Details of Property Being Purchased

Address:

Town / Suburb: State: Postcode:

Corporate Security (Bare) Trustee Details: LEAVE BLANK IF INDIVIDUAL TRUSTEE

Name of Trustee: A.C.N.

Registered Office:

Town / Suburb: State: Postcode:

Occupiers Name:
(Where this Company does not occupy the Registered Office – otherwise leave blank)

Principal Place of Business:
(Leave Blank if Reg'd Office)

Town / Suburb: State: Postcode:

Lender's Details

Name of Lender Westpac NAB St George I-Loan CBA Other (please detail below)

Loan Amount: \$ -----

SMSF Corporate Trustee Details: LEAVE BLANK IF INDIVIDUAL TRUSTEE

Name of Trustee: A.C.N.

Registered Office:

Town / Suburb: State: Postcode:

Occupiers Name:
(Where this Company does not occupy the Registered Office – otherwise leave blank)

Principal Place of Business:
(Leave Blank if Reg'd Office)

Town / Suburb: State: Postcode:

ASSOCIATED INDIVIDUALS

In this section please include all the Members and Directors of the SMSF and Trustee Company **and** all of the Directors of the Security (Bare) Trustee or any persons acting as Individual Trustees of either the SMSF Trust or Bare Trust.

Name:
(Full Legal Name)

Address:

Town / Suburb: State: Postcode:

Tick all of the following that apply to this Individual:

- Member of SMSF SMSF Trustee / Director of Trustee Security trustee / Director of Trustee

Name:
(Full Legal Name)

Address:

Town / Suburb: State: Postcode:

Tick all of the following that apply to this Individual:

- Member of SMSF SMSF Trustee / Director of Trustee Security trustee / Director of Trustee

More Associated Individuals attached (tick if Yes)

SMSF BARE TRUST - ADDITIONAL INDIVIDUALS

Name of Fund

Name:
(Full Legal Name)

Address:

Town / Suburb: State: Postcode:

Tick all of the following that apply to this Individual:

Member of SMSF SMSF Trustee / Director of Trustee Security trustee / Director of Trustee

Name:
(Full Legal Name)

Address:

Town / Suburb: State: Postcode:

Tick all of the following that apply to this Individual:

Member of SMSF SMSF Trustee / Director of Trustee Security trustee / Director of Trustee

Name:
(Full Legal Name)

Address:

Town / Suburb: State: Postcode:

Tick all of the following that apply to this Individual:

Member of SMSF SMSF Trustee / Director of Trustee Security trustee / Director of Trustee

More Associated Individuals attached (tick if Yes)

DO NOT SEND THIS PAGE – FOR YOUR INFORMATION ONLY

Self Managed Superannuation Fund - Trustee & Member Requirements

	Single Member	2 - 4 Members
Corporate Trustee	Member must be a director Can have 2nd director but not compulsory 2nd director can't be an employer of the member unless the 2nd director is related to member	All members must be directors All directors must be members No member can be an employee of another member unless the members are related
Individual Trustees	Must have two individual trustees Member must be one of the trustees 2nd trustee can't be an employer of the member unless the 2nd trustee is related to the member	All members must be trustees All trustees must be members No member can be an employee of another member unless the members are related

For more information visit www.ato.gov.au/super

Section 17A of the Superannuation Industry (Supervision) Act 1993 provides the definition of a Self Managed Superannuation Fund

Please send this order to: SMSF Loans Pty Limited

Fax: 02 4958 2921

Email: info@smsfloan.com.au

Post: PO Box 109 Boolaroo NSW 2284