



# SMSF GEARED INVESTMENT DEED ORDER FORM

NAME: .....

FIRM: .....

PHONE: .....

E-MAIL: .....

**FREECALL 1800 773 477**

## SMSF DETAILS

SMSF Name .....

SMSF Trustee Name/s  
*(include ACN if Company)* .....

SMSF Address .....

Names of ALL Directors  
*(1<sup>st</sup> 2 listed to be signatories)* .....

Names of ALL SMSF Members  
*(Fund members)* .....

Please submit a copy of the original fund deed (and any documents that have amended it) together with this order form

## BARE TRUST DETAILS

Bare Trust Name .....

Bare Trustee Name .....

ACN .....

Bare Trustee Address .....

Names of ALL Directors  
*(1<sup>st</sup> listed to be Chairman)*  
*(1<sup>st</sup> 2 listed to be signatories)* .....

## INVESTMENT DETAILS

**ASSET DESCRIPTION** – Please provide a full description of the asset being acquired as the investment including real property description in the case of land.

.....  
.....  
.....  
.....

Title Reference ..... Real Property Description .....

County ..... Parish .....

**PAYMENT DETAILS:** Please debit the following credit card in the amount below (see over for charges).

TYPE OF CARD: Visa  Mastercard  \*Diners Club  \*Amex  \* 3% surcharge applies.

CARD NUMBER: ..... EXPIRY DATE: ( / )

NAME ON CARD: ..... SIGNATURE: .....

Please return this Form on FREEFAX 1800 655 556 or call with any queries.

IS THE BORROWING BEING SOURCED FROM A BANK OR OTHER INSTITUTIONAL LENDER?

YES

NO

(If YES) Name of Bank / Institution \_\_\_\_\_

**PLEASE COMPLETE THE FOLLOWING ONLY IF THE BORROWING IS SELF FUNDED – DO NOT COMPLETE IF FUNDING SOURCE IS A BANK OR LENDING INSTITUTION.**

*These details are only required if loans are to be obtained from persons or companies who do not have standard loan documentation. For example where a party related to the SMSF makes a loan for the asset acquisition.*

### LENDER

Lender's Name \_\_\_\_\_  
*(include ACN if Company)*

Street Address \_\_\_\_\_

Names of ALL Directors \_\_\_\_\_  
*(1<sup>st</sup> listed to be Chairman)*  
*(1<sup>st</sup> 2 listed to be signatories)*

### LOAN DETAILS

Loan Amount \$ \_\_\_\_\_

Term \_\_\_\_\_

If a loan constitutes a Div 7A loan then the applicable term will be the lesser of the maximum period available under Div 7A and the terms stipulated by you.

Interest Rate \_\_\_\_\_

If the loan constitutes a Div 7A loan then the applicable interest rate will be the higher of the rate stipulated by you and the rate applicable from time to time under Div 7A. the interest rate may be linked to actual funding costs rather than a set rate and may be fixed or variable.

Loan Security (please provide a FULL description of the security to be given securing the loan including a description of the property or assets)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**IMPORTANT NOTE:** ACIS does not provide advice in relation to superannuation matters, superannuation borrowings, instalment warrants or any stamp duty or other state or territory taxes nor in respect of any other matter. Please note that superannuation laws and practice, taxation laws and practice, trust laws and stamp duty laws are continually changing. Professional advice should be obtained before signing any documents. Significant fees, duties and penalties can be imposed when entering into arrangements of this type. You must satisfy yourself that the documents comply with the relevant legislation and the law regarding arrangements of this type particularly the Superannuation Industry (Supervision) Act 1993 and Regulations. Accordingly, except to the extent required by law, we do not accept any responsibility other than in relation to the provision of the documents in accordance with your instructions.



### SMSF GEARED INVESTMENT STRUCTURE

Under the ACIS standard documentation, the SMSF borrows directly from the nominated lender and invests the borrowed funds and any additional amount to be contributed by the SMSF in the asset which is held by a custodian trustee.

If you require a non standard structure, please contact us to discuss prior to ordering.

#### DO YOU REQUIRE:

- Bare Trust Deed
  
- New company for corporate custodian trustee (recommended)  
*Please attach a completed Company Registration Order Form*
  
- SMSF Trust Deed Upgrade (recommended)  
*Please attach a completed Superannuation Deed Upgrade Order Form*
  
- New SMSF Trust Deed  
*Please attach a completed SMSF Trust Deed Order Form*

#### COMPLETE BELOW ONLY IF SELF FUNDED AND YOU HAVE COMPLETED PAGE 2

- Loan Agreement   
*Please complete the Loan Agreement details*
  
- Mortgage   
*Please complete the Loan Security details*

<b>ACIS SMSF GEARED INVESTMENT DEED – STANDARD FEES AND CHARGES</b>
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SMSF BARE TRUST WITH LOAN AGREEMENT AND MORTGAGE	\$1650.00 GST inc.
SMSF BARE TRUST WITH LOAN AGREEMENT	\$1100.00 GST inc.
SMSF BARE TRUST ONLY	\$550.00 GST inc.

**These fees exclude new corporate custodian trustee, new SMSF trust deed, super deed upgrade or security documents where required. Please contact ACIS for a quote prior to ordering.**

**IMPORTANT NOTE:** *The above fees and charges do not include additional out of pocket expenses required for the completion of the transaction documents. For example, stamp duties and registration fees will be payable in all jurisdictions in relation to any loan or security documentation and are not included in these fees.*