



SMSF Order Form

Name	<input type="text"/>	Phone	<input type="text"/>
Firm	<input type="text"/>	E-mail	<input type="text"/>

Fund Name

Meeting Address

Trustees and Members

Corporate Trustee
(if applicable)

ACN TFN

Address

Officer Names and Roles (First Officer listed to be Chairman, first 2 Officers to be signatories)	<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
	<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
	<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
	<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary

#1 (To be Primary Contact)
Name

Address

Date of Birth TFN Email Address

Employer (include ACN if company)

Role/s Held Individual Trustee Member

#2
Name

Address

Date of Birth TFN Email Address

Employer (include ACN if company)

Role/s Held Individual Trustee Member

#3
Name

Address

Date of Birth TFN Email Address

Employer (include ACN if company)

Role/s Held Individual Trustee Member

#4
Name

Address

Date of Birth TFN Email Address

Employer (include ACN if company)

Role/s Held Individual Trustee Member

Any Member under a legal disability (e.g. minors) must be represented by a Legal Personal Representative "LPR". Please provide the full name and address of each LPR in the Additional Information section of this order.

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Additional Information/Special Instructions

Payment Details

Please debit the following card details by the amount of \$

Type of Card	<input type="checkbox"/> Visa	<input type="checkbox"/> Mastercard	<input type="checkbox"/> Diners Club*	<input type="checkbox"/> Amex*	*3% SURCHARGE APPLIES		
Card Number	<input type="text"/>			Expires	<input type="text"/>	CCV	<input type="text"/>
Name on Card	<input type="text"/>			Signature	<input type="text"/>		

Completing this Order Form

Self Managed Superannuation Funds

Trustee / Member - Generally, under the Superannuation Industry (Supervision) Act 1993:

- (a) ALL fund members must be trustees (or directors of a corporate trustee) and ALL trustees (or directors of a corporate trustee) must be fund members;
- (b) sole member funds without a corporate trustee must have at least 2 individual trustees one of whom is the sole member;
- (c) sole member funds with a corporate trustee may have a single director being the sole member, or 2 directors one of whom must be the sole member.
- (d) an SMSF must not have more than 4 members

Legal Personal Representative - If a member is a minor or otherwise incapacitated (infirm or mentally incapable), they must be represented by an individual trustee/director of a corporate trustee who is over 18 and having full legal capacity.