

Self Managed Superannuation Fund Application

Australia

SELF MANAGED SUPERANNUATION FUND APPLICATION

1. SUPERANNUATION FUND

Name of Superannuation Fund:

Date of Commencement: (ddmmyy)

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2. TRUSTEE SELECTION

Individual Trustee

please complete sections 3,5,6,7,8

Company Trustee

please complete sections 4,5,6,7,8

3. TRUSTEE DETAILS

1. Full Name of Trustee:

Tax File Number:

Physical Address:

2. Full Name of Trustee:

Tax File Number:

Physical Address:

3. Full Name of Trustee:

Tax File Number:

Physical Address:

4. Full Name of Trustee:

Tax File Number:

Physical Address:

4. COMPANY DETAILS

Name of Company:

Address/Registered Office of Company:

Name and Address of Directors:

ACN/ABN:

Company Tax File Number:

Company Seal Required? Yes No

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5. MEMBER INFORMATION

MEMBER 1

Male Female

Title and Name:

Date of Birth: (ddmmyy)

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Tax File Number:

Postal Address:

Home Address: (if same as postal write "as above")

Occupation:

MEMBER 2

Male Female

Title and Name:

Date of Birth: (ddmmyy)

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Tax File Number:

Postal Address:

Home Address: (if same as postal write "as above")

Occupation:

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5. MEMBER INFORMATION (continued)

MEMBER 3

Male Female

Title and Name:

Date of Birth: (ddmmyy)

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Tax File Number:

Postal Address:

Home Address: (if same as postal write "as above")

Occupation:

MEMBER 4

Male Female

Title and Name:

Date of Birth: (ddmmyy)

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Tax File Number:

Postal Address:

Home Address: (if same as postal write "as above")

Occupation:

6. EMPLOYER CONTRIBUTOR (IF ANY)

Name of Company/Trust:

ABN/ACN:

Address for any employer contributor to the Fund:

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7. CONTACT INFORMATION

Name of Contact:

Business Phone:

Business Fax:

Mobile:

Home Phone:

E-mail:

Preferred
Contact
Method

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8. FEES

Establishment Fee

- ← Individual Trustee: AUD 1,100
- ← Corporate Trustee: AUD 1,800

Annual Management Fee

Capital Introduced / Fund Balance	Annual Fee
\$0 - \$250,000	\$2,550
\$250,001 - \$500,000	\$2,850
\$500,001 - \$750,000	\$3,250
\$750,001 - \$1,000,000	\$4,160
\$1,000,001 - \$1,250,000	\$5,150
\$1,250,001 - \$1,500,000	\$6,140
\$1,500,001 - \$1,750,000	\$6,800
\$1,750,001 - \$2,000,000	\$7,460
\$2,000,001 or more	\$8,120

The annual management fee excludes GST, audit fee, annual SMSF ATO Lodgement Fee of \$150 and out of pocket expenses. Management fee will be charged on quarterly basis in arrears.

Global Pensions Australia Pty Ltd reserves the right to vary without notice the charges or to introduce additional charges if significant additional activity should become necessary in order to comply with any regulatory or other requirements or circumstances arising that have consequences for the administration of the funds.

I / We authorise **Global Pensions Australia Pty Ltd** to establish a SMSF and agree to the establishment and annual management fee.

Signature

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Name

Date