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SMSF Order Form

Name Phone
 Firm E-mail
 Address

SMSF Name

Meeting Address

Trustees and Members

Corporate Trustee (if applicable)

ACN

Address

Officer Names and Roles (First Officer listed to be Chairperson, 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
<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 Email Address

Employer (include ACN if company)

Role/s Held Individual Trustee Member

#2 Name

Address

Date of Birth Email Address

Employer (include ACN if company)

Role/s Held Individual Trustee Member

#3 Name

Address

Date of Birth Email Address

Employer (include ACN if company)

Role/s Held Individual Trustee Member

#4 Name

Address

Date of Birth Email Address

Employer (include ACN if company)

Role/s Held Individual Trustee Member

Please return this completed form to acis@acis.net.au or Locked Bag 1, Fortitude Valley Q 4006

By completing and/or submitting this order form, you confirm that you have read and accepted our Terms and Conditions which can be found at www.acis.net.au/terms-and-conditions.



SMSF Order Form

#5

Name

Address

Date of Birth Email Address

Employer (include ACN if company)

Role/s Held Individual Trustee Member

#6

Name

Address

Date of Birth 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.

Additional Information/Special Instructions

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; and,
- (d) an SMSF must not have more than 6 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.