

SMSF Establishment Form

What you are required to do to order your SMSF:

1. Complete all relevant fields in BLOCK LETTERS
2. Fax this form to Justsuper Pty Ltd at (03) 9616 2901; or email this form to info@justsuper.com.au

SECTION A(D): PERSON/ADVISOR ORDERING FUND

YOUR NAME				Signature	
YOUR POSTAL ADDRESS					
YOUR COMPANY NAME					
DATE OF ORDER		/ /			
Phone		Fax		Email	

SECTION B: FUND DETAILS

NAME OF FUND	
Establishment Date	/ /
State of registration of the SMSF	
Fund street address	
Fund postal address, if different	
Address where the meetings of the trustees will be held	

Note: Please ensure the fund name is unique e.g. "J & R Jones Super Fund" rather than "Jones Super Fund". DO NOT place "The" at the beginning of the name as in "The J & R Jones Super Fund".

SECTION C: DETAILS OF INDIVIDUALS ASSOCIATED WITH THE FUND

Individual 1	Full name	Sex (M/F)	
Address			
Tax File Number*	- -	Date of Birth	/ /
Individual Trustee (please tick if appropriate)	<input type="checkbox"/>	Director of Corporate Trustee (please tick if appropriate)	<input type="checkbox"/>
Member (please tick if appropriate)	<input type="checkbox"/>		

Individual 2	Full name	Sex (M/F)	
Address			
Tax File Number*	- -	Date of Birth	/ /
Individual Trustee (please tick if appropriate)	<input type="checkbox"/>	Director of Corporate Trustee (please tick if appropriate)	<input type="checkbox"/>
Member (please tick if appropriate)	<input type="checkbox"/>		

Individual 3	Full name	Sex (M/F)	
Address			
Tax File Number*	- -	Date of Birth	/ /
Individual Trustee (please tick if appropriate)	<input type="checkbox"/>	Director of Corporate Trustee (please tick if appropriate)	<input type="checkbox"/>
Member (please tick if appropriate)	<input type="checkbox"/>		

Individual 4	Full name	Sex (M/F)	
Address			
Tax File Number*	- -	Date of Birth	/ /
Individual Trustee (please tick if appropriate)	<input type="checkbox"/>	Director of Corporate Trustee (please tick if appropriate)	<input type="checkbox"/>
Member (please tick if appropriate)	<input type="checkbox"/>		

Note: Any member that is employed by another member must be a director of the employer (where a company) or a relative of the employer. Persons previously convicted of an offence involving dishonesty are disqualified from being admitted to a SMSF. Severe penalties can be imposed for any breach.

*Providing the Tax File Number (TFN) for each Member of the Fund is *not* compulsory. However after 1 July 2007, if a Member does not provide their TFN to their Fund, they will be taxed at top marginal tax rates on concessional contributions made to the fund, and the fund will not be able to accept non-concessional contributions from the Member.

SECTION D : TRUSTEE INFORMATION WHERE TRUSTEE IS A COMPANY

Name		ACN	- -
Registered Office			
Principal Place Of Business			
Company Chairman			

Please notify us if the company above does not authorise resolutions by circulating minutes instead of having a directors meeting.