

Aspire | Innovate | Grow

Existing Fund Client Engagement Form
- Corporate Trustee

FUND DETAILS

Fund Name

ABN

TFN

The fund is registered for GST

The fund is paying a pension

Bank Account Details

Financial Institution

BSB

Account Number

What is the first financial year we are to prepare?

COMPANY DETAILS

Name

ACN

Registered Address

Number and Street

City

State

Post Code

I/we wish for Prime SMSF Solution (Prime Securities Limited) to be the registered address for the company and prepare the annual company review. I/We understand there is an additional fee for this service as per the Fee Schedule found at www.primefinancial.com.au. (PLEASE NOTE: We can only be the registered address for Special Purpose Corporate Trustees.)

DIRECTOR(S) DETAILS

Director One (Please list details of your key contact)

Member (tick if YES)

Salutation Mr Mrs Ms Miss Dr

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment Number and Street

City State Post Code

Date of Birth Tax File Number

Telephone Number Email Address

City of Birth Country of Birth

Director Two

Member (tick if YES)

Salutation Mr Mrs Ms Miss Dr

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment Number and Street

City State Post Code

Date of Birth Tax File Number

Telephone Number Email Address

City of Birth Country of Birth

DIRECTOR(S) DETAILS CONTINUED

Director Three

Member (tick if YES)

Salutation Mr Mrs Ms Miss Dr

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment

Number and Street

City

State

Post Code

Date of Birth

Tax File Number

Telephone Number

Email Address

City of Birth

Country of Birth

Director Four

Member (tick if YES)

Salutation Mr Mrs Ms Miss Dr

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment

Number and Street

City

State

Post Code

Date of Birth

Tax File Number

Telephone Number

Email Address

City of Birth

Country of Birth

ADVISER DETAILS

Salutation Mr Mrs Ms Miss

Business Names

Given Name

Surname

Unit/Suite

Number and Street

City

State

Post Code

Telephone Number

Fax Number

Email Address

I consent to you discussing my superannuation matters direct with my adviser (tick if YES)

I consent to my adviser having online access to the reporting portal (tick if YES)

IDENTIFICATION

We need identification for each fund Trustee Director/Member.

Please copy and provide along with this form either both sides of your Drivers Licence or the ID page of your passport.

DECLARATION

By applying my/our signatures below, I/we confirm that:

- I/we engage Prime Securities Limited (Prime SMSF Solution) for all services outlined at www.primefinancial.com.au.
- I/we have accessed, read and understood the Prime SMSF Solution terms and conditions (Terms) which have been provided to me and are available at www.primefinancial.com.au.
- I/We agree to be bound by the Terms and any variation of the Terms.
- I/We have read and understood the Fee Schedule provided to us and which is available at www.primefinancial.com.au .
- All information provided in this form is true and correct.
- I/We consent to the collection, use and disclosure of personal information by Prime SMSF Solution in accordance with the Prime Group’s Privacy Policy located www.primefinancial.com.au/privacy-policy-2/ .
- Prime SMSF Solution is authorised to contact the Fund’s previous administrator or accountant to obtain the information required to administer the Fund.
- I/We expressly authorise Prime SMSF Solution to act on the instructions of any one trustee [director of the trustee] of the SMSF without the need to confirm instructions with any other trustee [director].

Date / /

Director 1

Date / /

Director 2

Date / /

Director 3

Date / /

Director 4