

Aspire | Innovate | Grow

New Fund Client Engagement Form - Corporate Trustee

FUND DETAILS

Fund Name

Please confirm what you would like to call your fund. There are no statutory naming standards which apply to self-managed super funds, so it is possible two funds will have the same name. The ABN will work as the unique statutory identifier.

- I/we would like Prime SMSF Solutions to establish a Macquarie Bank Account OR
- I/we would like to establish our own bank account AND
- I/we wish to register the fund for GST

STATEMENT OF ADVICE

- I/we confirm I/we have received a Statement of Advice (SOA) for the establishment of an SMSF and attach a copy OR
- I/we confirm I/we have not received a Statement of Advice (SOA) and wish to engage Prime SMSF to prepare this at a cost of \$695.
- I/we confirm I/we have not received a Statement of Advice (SOA) and do not wish to obtain one. I/we understand and accept the directors are solely responsible for making the decision to establish the fund.

PAYMENT DETAILS

Please arrange payment of the fund establishment fee of **\$695** and company incorporation fee of **\$895**, a total of **\$1590** via one of the two below methods. Once payment is received we will establish your SMSF.

- Credit Card
To pay by credit card, please call us.
- Electronic Funds Transfer (EFT)
Account Name: Primestock Securities Limited SMSF
BSB: 033 083
Account Number: 418 162
Description: Please quote your super fund name you elect on page 1 as your reference.

COMPANY DETAILS

I/we have an existing company I/we wish to act as a Corporate Trustee

Name

ACN

Registered Address

Number and Street

City

State

Post Code

I/we would like Prime SMSF Solutions to establish a Special Purpose Corporate Trustee on my/our behalf.

Name Option 1

Name Option 2

I/we wish for Prime SMSF Solution 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 provided to me. (PLEASE NOTE: We can only perform this function for Special Purpose Corporate Trustees.)

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)

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

IDENTIFICATION

We need identification for each fund Trustee.

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 the following;

- 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/ .
- 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