

Self Managed Superannuation Fund

Set-up a new SMSF - Instructions Form

Primary Contact Details

Title

Given name

Surname

Address

Postal address (if different)

Telephone / Mobile

Email

Fund Details

Provide a name for the fund, for example ABC Superannuation Fund

Preferred fund name

*Trustee of the fund

Individual trustee - complete Part 2

Corporate trustee - complete Part 1 & 2

*Please note that you will require a corporate trustee if you plan on borrowing funds from the bank.

Part 1 - Corporate Trustee Details

If a trustee company is required, we can arrange for the incorporation of the company.

Incorporated trustee company [\(click to check name availability on ASIC register\)](#)

Preferred company name (in order of preference)

Second preference company name

Registered address

Existing company as trustee (used where existing SMSF company trustee already setup)

Company name

Registered address

Company ACN/ABN

Part 2 -Trustee and Member Details

A SMSF may have up to 4 members and all members must be individual trustee(s) or director(s) of the trustee company. If the fund has only 1 member and the trustee is not a company there must be one other individual trustee. A member cannot be employed by another member or trustee unless they are relatives.



Person A				Person B			
Title				Title			
Given name		Surname		Given name		Surname	
Date of birth		TFN		Date of birth		TFN	
Residential address				Residential address			
Role	Individual trustee	Trustee director		Role	Individual trustee	Trustee director	
	Member				Member		
Is this member employed by another member and not related		Yes	No	Is this member employed by another member and not related		Yes	No
Are you a disqualified person under superannuation laws?		Yes	No	Are you a disqualified person under superannuation laws?		Yes	No
If we are incorporating the corporate trustee, complete below				If we are incorporating the corporate trustee, complete below			
Place of birth (city, state, country)				Place of birth (city, state, country)			
Tick if this person will be a shareholder of the trustee company				Tick if this person will be a shareholder of the trustee company			
Beneficial shareholder - 1 ord fully paid share				Beneficial shareholder - 1 ord fully paid share			

Part 2 -Trustee and Member Details - continued from previous page

Person C				Person D			
Title				Title			
Given name		Surname		Given name		Surname	
Date of birth		TFN		Date of birth		TFN	
Residential address				Residential address			
Role	Individual trustee	Trustee director		Role	Individual trustee	Trustee director	
	Member				Member		
Is this member employed by another member and not related		Yes	No	Is this member employed by another member and not related		Yes	No
Are you a disqualified person under superannuation laws?		Yes	No	Are you a disqualified person under superannuation laws?		Yes	No
If we are incorporating the corporate trustee, complete below				If we are incorporating the corporate trustee, complete below			
Place of birth (city, state, country)				Place of birth (city, state, country)			
Tick if this person will be a shareholder of the trustee company				Tick if this person will be a shareholder of the trustee company			
Beneficial shareholder - 1 ord fully paid share				Beneficial shareholder - 1 ord fully paid share			

Consent and Declaration

Date

Trustee / Director

Trustee / Director

Trustee / Director

Trustee / Director

Signature

Signature

Signature

Signature

Payment

Please provide payment details for the set-up of the SMSF (see below for details on setup costs)

Direct deposit

Deposit to our bank account:

BSB: Account:

Payment reference: surname of person A

Cheque payment

Make cheque payable to Zollo & Co Pty Ltd

Credit Card

Master

Visa

Card number

Name on card

Expiry

Please charge

Return Completed Form

-Ensure the form is signed by each trustee

-To verify identity and signature, please attach a copy of each trustee's driver license, passport or other photo ID

Email completed form to info@zollo.com.au | Fax completed form to (08) 7225 2073

Post completed form to PO Box 3165 Melbourne Street, North Adelaide SA 5006

*Setup Costs (incl GST):

SMSF Trust Deed \$149

Company - SMSF Special Purpose \$582

SMSF Borrowing Arrangement (incl Bare Trust Deed & Deed of Loan) \$396

Above setup prices are subject to change without notice.

*This price does not include our time to setup the SMSF, this time is charged in the preparation of financial statements for the fund.