

## SMSF BARE TRUST – ORDER FORM

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SMSF FUND NAME:.....

Please provide:  Bare Trust/Nomination Documents

You may choose the following additional documents but these will incur additional fees. Please contact us for a Quote.

- New Super Fund (if the SMSF does not already exist)
- SMSF Rules Update (most lenders require specific clauses in your SMSF rules)
- New Company as SMSF Trustee (if setting up a fund with a new corporate trustee)
- New Company as Security (Bare) Trustee
- Loan Agreement (where there is a non arms length loan to be set up)
- Change to trustees of SMSF (to corporate trustee)

### DETAILS OF PROPERTY BEING PURCHASED:

Address: .....

Town: ..... State: ..... Postcode: .....

### CORPORATE SECURITY (BARE) TRUSTEE DETAILS (if any)

Name of Trustee: .....

A.C.N.: .....

Registered Office Address:  C/- Applicant or .....

Town: ..... State: .....Postcode: .....

Principal Place of Business:  Same as Registered Office: :  Same as 1st Individual shown below:

### LENDERS DETAILS

NAB  The Rock  Bendigo  Westpac  St George  Other (details below)

Name of Lender: .....

### SMSF CORPORATE TRUSTEE DETAILS (if any)

Name of Trustee: .....

A.C.N.: .....

Registered Office Address:  C/- Applicant or .....

Town: ..... State: .....Postcode: .....

Principal Place of Business:  Same as Registered Office: :  Same as 1st Individual shown below:

**ASSOCIATED INDIVIDUALS**

In this section please include  
All the members or directors of the trustee company of the SMSF  
All the directors of the Security Trustee

Only complete Date of Birth, Place of Birth & Director's consents if setting up a trustee company as part of this order

Full Name: .....

Address: .....

Town: ..... State: ..... Postcode: .....

SMSF trustee/director of trustee: :  Security trust/Director of security trustee: .. Loan Guarantor  
(Is this person a trustee of the SMSF) (Is this person a security trustee) (If guaranteeing the loan)

Date of Birth: ...../...../..... Place of Birth: .....(Town/City and State)

I hereby consent to act as a director / secretary / shareholder of the company

.....(Signature)

Full Name: .....

Address: .....

Town: ..... State: ..... Postcode: .....

SMSF trustee/director of trustee: :  Security trust/Director of security trustee: .. Loan Guarantor  
(Is this person a trustee of the SMSF) (Is this person a security trustee) (If guaranteeing the loan)

Date of Birth: ...../...../..... Place of Birth: .....(Town/City and State)

I hereby consent to act as a director / secretary / shareholder of the company

.....(Signature)

Full Name: .....

Address: .....

Town: ..... State: ..... Postcode: .....

SMSF trustee/director of trustee: :  Security trust/Director of security trustee: .. Loan Guarantor  
(Is this person a trustee of the SMSF) (Is this person a security trustee) (If guaranteeing the loan)

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