

PAPSON LEGAL – NEW SMSF ORDER FORM

APPLICANT INFORMATION

Name of Firm: _____

Contact Person: _____

Mailing Address: _____

Phone Number: _____ Email Address: _____

Tick this box if you would like the documentation in hard copy (we will charge a small postage disbursement on top of our usual fee)

Tick this box if you would like us to invoice the fund's trustee

FUND INFORMATION

Name of Fund: _____

TRUSTEE INFORMATION

Please complete the trustee information below for **either** a corporate trustee or individual trustees.

CORPORATE TRUSTEE

Have you ordered a company from Papson Legal to be trustee? If **yes**, then check this box and provide us with the details on the company order form.

If **not**, then please complete the details below.

Company Name: _____

Company ACN: _____

Registered Address of Company: _____

Full Name and Home Address of Director 1: [T1]

Full Name and Home Address of Director 2: [T2]

Full Name and Home Address of Director 3: [T3]

Full Name and Home Address of Director 4: [T4]

OR INDIVIDUAL TRUSTEES

Full Name and Home Address of Trustee 1: [T1]

Full Name and Home Address of Trustee 2: [T2]

Full Name and Home Address of Trustee 3: [T3]

Full Name and Home Address of Trustee 4: [T4]

MEMBER INFORMATION

Member 1 – Indicate if Member 1 is T1 here , otherwise list name and address below.

Date of Birth of Member 1: _____ Tax File Number: _____

Member 2 – Indicate if Member 1 is T2 here , otherwise list name and address below.

Date of Birth of Member 2: _____ Tax File Number: _____

Member 3 – Indicate if Member 1 is T3 here , otherwise list name and address below.

Date of Birth of Member 3: _____ Tax File Number: _____

Member 4 – Indicate if Member 1 is T4 here , otherwise list name and address below.

Date of Birth of Member 4: _____ Tax File Number: _____

A COUPLE OF FINAL QUESTIONS

Are all trustee/directors also members of the fund? Yes No

Are there any additional instructions with this order? _____

Once you have completed this form, please return it to Papson Legal by post (PO Box 1147, Armadale North, Victoria 3143) or email legal@papsonlegal.com.au. Please contact our office on (03) 9078 4430 or email us if you require further assistance.