

NEW SMSF

Please complete all details in block letters.

Delivery of documents (electronic/hardcopy)	
Documents will be delivered electronically in PDF format. Alternatively, tick here to receive hardcopy documents (additional \$50 plus delivery costs)	<input type="checkbox"/> Hardcopy delivery
	<input type="checkbox"/> If receiving hardcopy, tick here if you do not require a ring binder
Name of Fund	

PERSON ORDERING

Firm Ordering (if applicable)	
Person ordering	
Tick here <input type="checkbox"/> if we are to invoice the fund's trustee (otherwise, our invoice will be made out to the person ordering).	
Street address	
Postal address, if different	
Phone	
Fax	
Email	

COMPANY OR INDIVIDUAL TRUSTEES

COMPANY TRUSTEE	If company ordered from DBA, tick here <input type="checkbox"/> and complete Member details on the next page (a company form should also be completed).
Company Name	
ACN	- -
Registered Office	
Full names of all directors	
T1	T2
T3	T4

OR:

INDIVIDUAL TRUSTEES		
T1	Full Name	
	Street Address	
T2	Full Name	
	Street Address	
T3	Full Name	
	Street Address	
T4	Full Name	
	Street Address	

MEMBERS

M1 - Full name: T1? <input type="checkbox"/>	Occupation	Name of dependant M2? <input type="checkbox"/>
Street address	Date of birth (dd/mm/yyyy) / /	Relationship to member Spouse? <input type="checkbox"/>
	Tax file number - -	Dependant's percentage 100%? <input type="checkbox"/>
M2 - Full name: T2? <input type="checkbox"/>	Occupation	Name of dependant M1? <input type="checkbox"/>
Street address	Date of birth (dd/mm/yyyy) / /	Relationship to member Spouse? <input type="checkbox"/>
	Tax file number - -	Dependant's percentage 100%? <input type="checkbox"/>
M3 - Full name: T3? <input type="checkbox"/>	Occupation	Name of dependant M4? <input type="checkbox"/>
Street address	Date of birth (dd/mm/yyyy) / /	Relationship to member Spouse? <input type="checkbox"/>
	Tax file number - -	Dependant's percentage 100%? <input type="checkbox"/>
M4 - Full name: T4? <input type="checkbox"/>	Occupation	Name of dependant M3? <input type="checkbox"/>
Street address	Date of birth (dd/mm/yyyy) / /	Relationship to member Spouse? <input type="checkbox"/>
	Tax file number - -	Dependant's percentage 100%? <input type="checkbox"/>

Note that any member employed by another member or a related entity must be a relative of the other member or a director of the employer and people previously convicted of an offence involving dishonesty are generally disqualified from admission to an SMSF. Severe penalties can be imposed for any breach.

Annual Update Service

Tick here if you wish to subscribe to the Annual Update Service*.

*Receive updates of the fund's deed and PDS each 1 July for \$137.50 if you sign up for direct debit. This service keeps your deed up-to-date with ongoing reforms.

SMSF PRODUCTS: tick to order

- Free** **Newsletter**, SMSF technical updates and seminar news
- \$550 **The Complete Guide to SMSFs and Planning for Loss of Capacity and Death**, this 140+ page book details everything you need to know about SMSF succession planning. It is updated each August. Tick here to also receive the next updated version for an additional \$110 (payable upon receipt of updated version). For full terms and conditions, see www.dbalawyers.com.au/complete-guide
- \$440 **Investment Strategy Kit**
- \$150 **FY2012 SMSF Kit**
- \$150 **Trustee Compliance Kit**
- \$440 per pension **Pension Commencement Kits**
I want to start: _____ (insert 1, 2, 3, etc) Account-Based Pension(s)
or tick here if Transition to Retirement Income Stream
- \$220 **SMSF Borrowing Memo**

Please also see <http://www.dbalawyers.com.au/> for further information.

SPECIAL INSTRUCTIONS

Note that DBA is not licensed to provide financial product advice under the *Corporations Act 2001* (Cth).