

**SMSF BORROWING — LRBA WIND-UP KIT**

**NOTE TO ADVISERS, ACCOUNTANTS AND OTHER AGENTS**

Advisers who complete this order form on behalf of an SMSF trustee agree that DBA Lawyers may seek to contact the SMSF trustee directly. Alternatively, the adviser undertakes to communicate our feedback including concerns to the SMSF trustee.

**SERVICE**

Standard service — this is a document only service and does not include a review of documents including any bare trust, loan, security or trust documents.

Premium service — this includes a review of the related bare trust, borrowing and trust documents for confirmation that the documents provided are sufficient to represent the agreement between the relevant parties that the bare trust arrangement can be ceased upon the SMSF trustee’s directions and that the lender agrees that the loan has been repaid in full.

Given we mainly provide SMSFs legal services, we do not attend to property or finance law matters including the discharge of any mortgage or security documents as this is usually handled by property and finance lawyers.

**CUSTODIAN ENTITY**

Company name:

ACN:

Street address:

Full names of signing directors

T1		T2	
T3		T4	

**OR, CUSTODIAN INDIVIDUAL TRUSTEES**

T1	Full name:
	Street address:
T2	Full name:
	Street address:

**NAME OF FUND (borrower)**

Name of fund:

**SMSF COMPANY TRUSTEE**

Company name:

ACN:

Registered office:

Full names of all directors

T1

T2

T3

T4

**OR, SMSF INDIVIDUAL TRUSTEES**

T1

Full name:

Street address:

T2

Full name:

Street address:

**LENDER**

Company name:

ACN:

Street address:

Full names of signing directors:

T1

T2

T3

T4

**OR, INDIVIDUAL LENDER**

T1

Full name:

Street address:

T2

Full name:

Street address:

**OR, TRUST LENDER**

Trust name:

Trustee (if a company) name:

ACN:

Street address:

If the lending trust's trustee are individuals:

T1

Full name:

Street address:

T2

Full name:

Street address:

<b>ASSET DESCRIPTION</b>
Address:
Volume:
Folio numbers:
Description as per limited recourse borrowing agreement:
Description as per bare trust deed:

<b>SPECIAL INSTRUCTIONS</b> (If there are more trustees, please provide their details here.)

Please return signed costs document with this completed form.