

New Fund Client Engagement Form - Corporate Trustee

Fund Details

Please confirm what you would like to call your fund. There are no statutory naming standards which apply to self-managed super funds, so it is possible two funds will have the same name. The ABN will work as the unique statutory identifier.

Fund name

I/we would like Prime SMSF Solution to establish

ANZ account.

a) Existing ANZ client

Yes

No

b) If yes, please provide your CRN(Customer Reference Number)

Macquarie Bank Account

I/We would like a Macquarie Accelerator Account to be established.

Yes

No

I/We would like to establish our own bank account AND

I/We wish to register the fund for GST

Statement of Advice

I/We confirm I/we have received a Statement of Advice (SOA) for the establishment of an SMSF and attached a copy

OR

I/We confirm I/we have not received a Statement of Advice (SOA) and do not wish to obtain one. I/We understand and accept the directors are solely responsible for making the decision to establish the fund.

Company Details

I/We have an existing company I/we wish to act as a Corporate Trustee

Name

ACN

Registered Address Number and Street

City

State

Post code

I/We would like Prime SMSF Solution to establish a Special Purpose Corporate Trustee on my/our behalf.

Name Option 1

Name Option 2

I/We wish for Prime SMSF Solution (Primestock Securities Limited) to be the registered address for the company and prepare the annual company review. I/We understand there is an additional fee for this service as per the fee schedule provided to me.

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Adviser Details

Title ☐ Mr ☐ Mrs ☐ Ms ☐ Miss

Business Name

Given name(s)

Surname

Address

City

State

Post code

Contact Number

Fax Number

Email Address

☐ I/We consent to you discussing my superannuation matters direct with my adviser (tick if YES)

☐ I/We consent to my adviser having online access to the reporting portal (tick if YES)

Director(s) Details

Director One (Please list details of your key contact)

Title ☐ Mr ☐ Mrs ☐ Ms ☐ Miss

☐ Member (tick if YES)

Given name(s)

Surname

Address (not a P.O Box)

City

State

Post code

Date of Birth

Tax File Number

DIN (Director ID Number)

Contact Number

Email Address

Country of Birth

City of Birth

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Director Two

Title Mr Mrs Ms Miss Member (tick if YES)

Given name(s) Surname

Address (not a P.O Box)

City State Post code

Date of Birth Tax File Number DIN (Director ID Number)

Contact Number Email Address

Country of Birth City of Birth

Director Three

Title Mr Mrs Ms Miss Member (tick if YES)

Given name(s) Surname

Address (not a P.O Box)

City State Post code

Date of Birth Tax File Number DIN (Director ID Number)

Contact Number Email Address

Country of Birth City of Birth

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Director Four

Title Mr Mrs Ms Miss Member (tick if YES)

Given name(s) Surname

Address (not a P.O Box)

City State Post code

Date of Birth Tax File Number DIN (Director ID Number)

Contact Number Email Address

Country of Birth City of Birth

Director Five

Title Mr Mrs Ms Miss Member (tick if YES)

Given name(s) Surname

Address (not a P.O Box)

City State Post code

Date of Birth Tax File Number DIN (Director ID Number)

Contact Number Email Address

Country of Birth City of Birth

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Director Six

Title Mr Mrs Ms Miss Member (tick if YES)

Given name(s) Surname

Address (not a P.O Box)

City State Post code

Date of Birth Tax File Number DIN (Director ID Number)

Contact Number Email Address

Country of Birth City of Birth

Identification

We need identification for each fund Trustee Director/Member.

Please copy and provide along with this form either both sides of your Drivers Licence or the ID page of your passport.

Declaration

By applying my/our signatures below, I/we confirm that:

- I/We engage Primestock Securities Limited (Prime SMSF Solution) for all services outlined at www.primefinancial.com.au
- I/We have accessed, read and understood the Prime SMSF Solution terms and conditions (Terms) which have been provided to me and are available at www.primefinancial.com.au
- I/We agree to be bound by the Terms and any variation of the Terms.
- I/We have read and understood the Fee Schedule provided to us and which is available at www.primefinancial.com.au
- All information provided in this form is true and correct.
- I/We consent to the collection, use and disclosure of personal information by Prime SMSF Solution in accordance with the Prime Group's Privacy Policy located at www.primefinancial.com.au/privacy-policy
- Prime SMSF Solution is authorised to contact the Fund's previous administrator or accountant to obtain the information required to administer the Fund.
- I/We expressly authorise Prime SMSF Solution to act on the instructions of any one trustee [director of the trustee] of the SMSF without the need to confirm instructions with any other trustee [director].

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Declaration

Director 1 Date

Director 2 Date

Director 3 Date

Director 4 Date

Director 5 Date

Director 6 Date