

SMSF ESTABLISHMENT

*The information requested on this form is required to establish your SMSF. Please complete all applicable details as accurately as possible. If you have any questions, please contact us.



BLUE CHIP
SMSF SERVICES

CHOSEN NAME OF THE SMSF TO BE ESTABLISHED

If your SMSF is going to use a company as trustee, please provide the preferred company name:

PREFERRED NAME OF THE TRUSTEE COMPANY (E.G. MY COMPANY PTY LTD)

Enter the names and details of all individuals who will be members of the fund:

	MEMBER/DIRECTOR 1	MEMBER/DIRECTOR 2	MEMBER/DIRECTOR 3	MEMBER/DIRECTOR 4
TITLE				
GIVEN NAMES				
LAST NAME				
HOME ADDRESS				
MAILING ADDRESS				
CONTACT PHONE				
MOBILE				
EMAIL				
GENDER				
DATE OF BIRTH				
PLACE OF BIRTH (town / city)				
STATE OF BIRTH (or overseas)				
COUNTRY OF BIRTH (if not Australia)				
OCCUPATION				
TAX FILE NUMBER				
AUSTRALIAN RESIDENT?				

SIGNATURES

CLIENT 01 _____ DATE _____

CLIENT 02 _____ DATE _____

Note: *Any change of name, *provide birth and divorce certificates | *DATE: I/WE confirm that all the info provided above is correct and accurate.

*Blue Chip SMSF Services does not provide financial advice, legal advice or taxation advice.

*Blue Chip SMSF Services is a document provider only and will not be liable for any investment decisions you make.

*You should seek advice before making any investment decisions.

*Where it is legal and necessary to do so, Blue Chip may disclose your personal information to third parties such as our product suppliers, contractors, professional advisers, government agencies and regulators or parties involved in the management of your SMSF

'If you decide not to proceed after signing this form, you acknowledge and agree to pay an SMSF wind-up fee of \$2,500 (incl. GST)' 'All directors/members must apply for a Director ID via ABRIS before we can set up an SMSF and/or Bare Trust with a company (corporate) trustee. Penalties may apply for non-compliance. Blue Chip SMSF Services is not liable for any fines or penalties imposed by ABRIS/ASIC. <https://www.abris.gov.au/director-identification-number/apply-director-identification-number>'

BARE TRUST ESTABLISHMENT



BLUE CHIP
SMSF SERVICES

*The information requested on this form is required to establish a Bare Trust. Please complete all applicable details as accurately as possible. If you have any questions, please contact us.

CHOSEN NAME OF THE BARE TRUST TO BE ESTABLISHED

Please provide your preferred trustee company name for the Bare Trust:

PREFERRED NAME OF THE TRUSTEE COMPANY (E.G. MY COMPANY PTY LTD)

Enter the names and details of all individuals who will be members and or directors of the fund:

	MEMBER/DIRECTOR 1	MEMBER/DIRECTOR 2	MEMBER/DIRECTOR 3	MEMBER/DIRECTOR 4
TITLE				
GIVEN NAMES				
LAST NAME				
HOME ADDRESS				
MAILING ADDRESS				
CONTACT PHONE				
MOBILE				
EMAIL				
GENDER				
DATE OF BIRTH				
PLACE OF BIRTH (town / city)				
STATE OF BIRTH (or overseas)				
COUNTRY OF BIRTH (if not Australia)				
OCCUPATION				
TAX FILE NUMBER				
AUSTRALIAN RESIDENT?				

SMSF & BARE TRUST ESTABLISHMENT	I agree to the once-off set-up fee of \$6000 + GST and the ongoing management fee of \$2,640 per financial year (or 12 equal monthly payments of \$220 including GST), payable from your SMSF.
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SIGNATURES

CLIENT 01 _____ DATE _____

CLIENT 02 _____ DATE _____

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*Blue Chip SMSF Services is a document provider only and will not be liable for any investment decisions you make.
*You should seek advice before making any investment decisions.
*Where it is legal and necessary to do so, Blue Chip may disclose your personal information to third parties such as our product suppliers, contractors, professional advisers, government agencies and regulators or parties involved in the management of your SMSF

'If you decide not to proceed after signing this form, you acknowledge and agree to pay an SMSF wind-up fee of \$2,500 (incl. GST)' 'All directors/members must apply for a Director ID via ABRIS before we can set up an SMSF and/or Bare Trust with a company (corporate) trustee. Penalties may apply for non-compliance. Blue Chip SMSF Services is not liable for any fines or penalties imposed by ABRIS/ASIC. <https://www.abris.gov.au/director-identification-number/apply-director-identification-number>'