**Contact Details**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Request to Establish A Self Managed Superannuation fund**



Please indicate if you require Super Notions to do the end Yes No

of year accounting and audit

**Compliance**

**Fund Details**

Fund Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Fund Commencement Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Individuals as trustees – *indicate at members\** Yes No

Company as trustee – *indicate directors at members\** Yes No

If yes, full company name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ACN:   

ABN:    

Date of registration: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Registered address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member details

**Member 1**

Full Name Date of birth Tax file number

 \_\_\_\_ / \_\_\_\_ / \_\_\_\_   

Address

 Post code

Full Name Date of birth Tax file number

 \_\_\_\_ / \_\_\_\_ / \_\_\_\_   

Address

 Post code

**Member 2**

**Member 1**

Full Name Date of birth Tax file number

 \_\_\_\_ / \_\_\_\_ / \_\_\_\_   

Address

 Post code

**Member 3**

Full Name Date of birth Tax file number

 \_\_\_\_ / \_\_\_\_ / \_\_\_\_   

Address

 Post code

**Member 4**

Note that any member that is employed by another member or related entity must be a relative or a director of the employer sponsor. Also persons previously convicted of an offence involving dishonesty are disqualified from being admitted to a SMFS. Contact us for further information as severe penalties can be imposed for breach of the member/trustee rules.

**Super Notions**

**Telephone: (03) 9578 4810**

**Fax: (03) 9578 4313**

**Email: wdodge@super-notions.com.au**

**P O Box 145, Ormond, Vic 3204**