

SMSF APPLICATION FORM

FUND DETAILS

Proposed fund name			
Mailing address			
Advisors Name: (if applicable)			
Contact Name:			
Phone (W):		Phone (H):	
Fax:		Mobile:	
Email:			

MEMBER AND/OR INDIVIDUAL TRUSTEES

Title		Title	
Full name		Full name	
Physical address		Physical address	
DOB		DOB	

Indicate with a cross if each person/s to be a member and/or trustee
If a corporate trustee is to be appointed do not tick trustee box

☐ Member

☐ Trustee

☐ Member

☐ Trustee

NB: All members must be trustees and all trustees must be members with the exception of one-member funds, where a second non-member trustee must be appointed. No member is allowed to be an employee of another member unless they are related.

Corporate trustee (if applicable)

Company name	
Registered address	
ACN & ABN	

NB: All members must be directors. No member is allowed to be an employee of another member unless they are related.

ELIGIBILITY FOR TRUSTEESHIP

Are all trustees/directors eligible to hold the position of trustee/director in accordance with SIS Act Sec 120? YES/NO

An individual is not eligible if:

At any time: (i) the individual was convicted of an offence (in respect of dishonest conduct) against or arising out of law of the Commonwealth, a State, A Territory or a foreign country; or
(ii) a civil penalty order was made in relation to the person; or (b) the person is an insolvent under administration

CONTINUING ADMINISTRATION

Envoy Super is to be appointed administrator of this SMSF.

AUTHORITY TO PROCEED














Please proceed with an SMSF set-up. We/I have been supplied with the Envoy Super fee schedule. We/I understand that Envoy Super is not a licensed investment advisor and has not provided any investment advice in relation to setting up this SMSF.

Signed _____ Signed _____
Trustee/Director Trustee/Director

Please fax, email or post completed SMSF Application form to;
Post: Envoy Super, PO Box 67, Glass House Mtns QLD 4518
Email: admin@envoysuper.com.au
Fax: (07) 54 969 796

FUND ESTABLISHMENT

The following documents are compiled into A permanent folder For the trustee:

-  **Summary of trustee's obligations**
-  **Two bound copies of trust deed (issued by national legal firm)**
-  **One unbound copy of trust deed**
-  **Application to register for the new tax system**
-  **ATO original advices for TFN, ABN, and Regulation**
-  **Member application(as)**
-  **Product Disclosure Statement for new member(as)**
-  **Trustee's declaration and consent to act form**
-  **Employer's application form if applicable**
-  **Proposed roll-over form**
-  **Minutes of inaugural meeting**
-  **Pro-forma investment strategy**
-  **TFN Declarations forms, if applicable**