

New SMSF establishment order form

Please complete this form and email to Phil Broderick at pbroderick@sladen.com.au, or call (03) 9611 0163 to chat to Phil directly. You will be sent an invoice for payment after we receive this form.

Contact <i>(enter your contact details here)</i>	
Name	
Firm	
Telephone	
Client <i>(enter your client's contact details here)</i>	
Full name	
Address	
Email & Telephone	
Co-branding	
Would you like the new deed to be co-branded with your details? If so, please complete the below information.	
Firm Name	
Firm Address	
Firm Telephone	
Firm Email	
Firm Contact Name	
Firm Reference	
Fund Name	
Name of Fund	
Members of the Fund	
Member 1 Full Name	<i>(Member 1 will be chair of the meeting of members unless we are instructed otherwise)</i>
Address	
Date of Birth	
Tax File Number	<i>(optional)</i>
Member 2 Full Name	
Address	
Date of Birth	
Tax File Number	<i>(optional)</i>
Member 3 Full Name	
Address	
Date of Birth	
Tax File Number	<i>(optional)</i>
Member 4 Full Name	
Address	
Date of Birth	
Tax File Number	<i>(optional)</i>



Member 5 Full Name	
Address	
Date of Birth	
Tax File Number	<i>(optional)</i>
Member 6 Full Name	
Address	
Date of Birth	
Tax File Number	<i>(optional)</i>
Trustee(s)	
Full name(s)	
ACN	<i>(if applicable)</i>
Address	
Director(s)	<i>(if applicable)</i>
Chair	<i>(chair of directors /trustees)</i>
Trustee will execute documents as:	
Natural person	<input type="checkbox"/>
A company will execute documents in one of the following ways in accordance with its constitution:	With seal Without seal
Director and second director or secretary	<input type="checkbox"/> <input type="checkbox"/>
Sole director and sole secretary	<input type="checkbox"/> <input type="checkbox"/>
Sole director and no secretary	<input type="checkbox"/> <input type="checkbox"/>
Tax Agent and Auditor	
Full name of Tax Agent	
Address	
Full name of Auditor	
Address	
Guardian	
Note: The Guardian has certain powers and rights under the fund deed and is an important option for succession planning. It is not compulsory for the fund to have a guardian. If you do not wish to have a guardian, leave this section blank. If you would like to discuss the guardian role and options for structuring the guardian role, please contact us.	
Full name(s)	
ACN	<i>(if applicable)</i>
Address	
Director(s)	<i>(if applicable)</i>
Chair	<i>(chair of directors /trustees)</i>

Guardian will execute documents as:

Natural person

A company will execute documents in one of the following ways in accordance with its constitution:

With seal

Director and second director or secretary

Sole director and sole secretary

Sole director and no secretary

Special Instructions