

Self managed superfund Set up form

Complete this form if you want Superannuation Accounting Services to set up a self managed superfund for you

- Set up a self managed superfund
- Trust deed
 - ABN / TFN application
 - Election to be a regulated fund (to be eligible for concessional tax treatment)
- Appoint Superannuation Accounting Services as accountant for the self managed superfund
- Preparation of financial statements
 - Audit of the fund by a nominee
 - Preparation of income tax and regulatory return
 - Preparation of member statements

Part 1 Founder details

Name	<input type="text"/>	Telephone	<input type="text"/>
Address	<input type="text"/>	Telephone (after hours)	<input type="text"/>
	<input type="text"/>	Mobile	<input type="text"/>
Postal address (if different)	<input type="text"/>	Email	<input type="text"/>
	<input type="text"/>		<input type="text"/>

Part 2 Preferred name of self managed superfund

Preferred name e.g. John Citizen Family Superannuation Fund

Part 3 Trustees and members

Trustee and members 1	<input type="text"/>	Date of birth	<input type="text"/>
Address	<input type="text"/>	Tax file number	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/> trustee <input type="checkbox"/> member	
Trustee and members 2	<input type="text"/>	Date of birth	<input type="text"/>
Address	<input type="text"/>	Tax file number	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/> trustee <input type="checkbox"/> member	
Trustee and members 3	<input type="text"/>	Date of birth	<input type="text"/>
Address	<input type="text"/>	Tax file number	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/> trustee <input type="checkbox"/> member	
Trustee and members 4	<input type="text"/>	Date of birth	<input type="text"/>
Address	<input type="text"/>	Tax file number	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/> trustee <input type="checkbox"/> member	

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Terms and conditions

1. Once Superannuation Accounting Services ('we', 'us') receive this form, we will proceed to set up a self managed superfund in accordance with the information supplied on this form.
2. You authorise us to collect, use and disclose your personal information for the purpose of setting up a self managed superfund.
3. We reserve the right not to set up the self managed superfund. In this case, you will not be charged any fee.
4. You agree to pay Superannuation Accounting Services for the services provided to you within the specified period for setting up the self managed superfund in accordance with the information supplied on this form.
5. You understand that our fee is not refundable.
6. You understand that you may incur additional costs if you wish to wind-up the self managed superfund once it has been set up.