

New Self-Managed Superfund Instruction Sheet.

PLEASE COMPLETE ALL DETAILS IN LEGIBLE HANDWRITING AND PROVIDE FULL LEGAL NAMES

Self-Managed Superfund Details –

1st Choice:

2nd Choice:

Please Note: If the first choice is unavailable, the 2nd choice will automatically be used.

The name of the person or entity establishing the fund:

Is the person or entity establishing the Fund?

- Individual
- Company

What is this person's or entity's address?

Which jurisdiction's laws apply to the Trust Deed? i.e. Which state?

How many members will the Fund have when it starts?

Member 1

Personal details

Given Names

Family Name

Occupation

Birth details:

City of Birth

State (if Australia)

Country

Date of Birth

Usual residential address

Street Number and Name

Suburb or City

State

Post Code

Country

What is the member's Tax File Number?

How does this member want to handle their death benefit payment arrangements? (Tick one)

- with a Death Benefit Nomination Form
- whether the nomination is "binding" or "non-binding". The law says that a "binding" nomination automatically lapses after 3 years;
- with a Death Benefit Agreement - which is binding and lasts until the member revokes it or replaces it;
- by doing nothing at this stage

Who does the member wish to appoint as their beneficiary under the death benefit arrangement?

- the member's legal personal representative
- other person(s)
- both the member's legal personal representative and other person(s)

What proportion of the death benefit is that person to receive, and what is their relationship to the member?

Given Names

Family Name

Relationship to member
(for example 100%)

Proportion of benefits

If the beneficiary dies before the member, how does the member want the death benefit to be distributed?

- to the member's legal personal representative
- in accordance with the trustee's obligations under the trust deed and superannuation law

If a beneficiary dies before the member, how does the member want that beneficiary's portion of the death benefit to be distributed?

- to the remaining beneficiaries in equal proportions
- to the member's legal personal representative
- in accordance with the trustee's obligations under the trust deed and superannuation law

If all of the beneficiaries die before the member, how does the member want the death benefit to be distributed?

- to the member's legal personal representative
- in accordance with the trustee's obligations under the trust deed and superannuation law

Do you want the member's death benefit nominations to bind the trustee?

Yes

No

Member 2

Personal details

Given Names

FamilyName

Occupation

Birth details:

City of Birth

State(if Australia)

Country

Date of Birth

Usual residential address

Street Number and Name

Suburb or City

State

Post Code

Country

What is the member's Tax File Number?

How does this member want to handle their death benefit payment arrangements? (Tick one)

- with a Death Benefit Nomination Form
- whether the nomination is "binding" or "non-binding". The law says that a "binding" nomination automatically lapses after 3 years;
- with a Death Benefit Agreement - which is binding and lasts until the member revokes it or replaces it;
- by doing nothing at this stage

Who does the member wish to appoint as their beneficiary under the death benefit arrangement?

- the member's legal personal representative
- other person(s)
- both the member's legal personal representative and other person(s)

What proportion of the death benefit is that person to receive, and what is their relationship to the member?

Given Names

Family Name

Relationship to member
(for example 100%)

Proportion of benefits

If the beneficiary dies before the member, how does the member want the death benefit to be distributed?

- to the member's legal personal representative
- in accordance with the trustee's obligations under the trust deed and superannuation law

If a beneficiary dies before the member, how does the member want that beneficiary's portion of the death benefit to be distributed?

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- to the member's legal personal representative.
- in accordance with the trustee's obligations under the trust deed and superannuation law

If all of the beneficiaries die before the member, how does the member want the death benefit to be distributed?

- to the member's legal personal representative
- in accordance with the trustee's obligations under the trust deed and superannuation law

Do you want the member's death benefit nominations to bind the trustee?

Yes

No

Member 3

Personal details

Given Names

Family Name

Occupation

Birth details:

City of Birth

State(if Australia)

Country

Date of Birth

Usual residential address

Street Number and Name

Suburb or City

State

Post Code

Country

What is the member's Tax File Number?

How does this member want to handle their death benefit payment arrangements? (Tick one)

- with a Death Benefit Nomination Form
- whether the nomination is "binding" or "non-binding". The law says that a "binding" nomination automatically lapses after 3 years;
- with a Death Benefit Agreement - which is binding and lasts until the member revokes it or replaces it;

- by doing nothing at this stage

Who does the member wish to appoint as their beneficiary under the death benefit arrangement?

- the member's legal personal representative
- other person(s)
- both the member's legal personal representative and other person(s)

What proportion of the death benefit is that person to receive, and what is their relationship to the member?

Given Names

Family Name

Relationship to member
(for example 100%)

Proportion of benefits

If the beneficiary dies before the member, how does the member want the death benefit to be distributed?

- to the member's legal personal representative
- in accordance with the trustee's obligations under the trust deed and superannuation law

If a beneficiary dies before the member, how does the member want that beneficiary's portion of the death benefit to be distributed?

- to the remaining beneficiaries in equal proportions
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- in accordance with the trustee's obligations under the trust deed and superannuation law

If all of the beneficiaries die before the member, how does the member want the death benefit to be distributed?

- to the member's legal personal representative
- in accordance with the trustee's obligations under the trust deed and superannuation law

Do you want the member's death benefit nominations to bind the trustee?

Yes

No

If the trustee is a Company. The following questions relate to that company - your answers will be provided to ASIC to register the company.

Company Details - proposed company names

1st Choice:

2nd Choice:

Please Note: If the first choice is unavailable, the 2nd choice will automatically be used.

State of Incorporation:

Is the company name identical to an existing Business name that you are authorised to use? Yes / No

Registered Business Name: (if identical to company name)

State of Registration:

Registration Number:

Please note: By completing the above section regarding the registered business name, you declare that you are either the registered owner(s) of the name or that you are authorised to make this application to register a company with that business name and also authorise NTAA Corporate and its suppliers to register the company in that name.

Registered Office

Street address (not a PO Box):

State & Postcode:

Does the company occupy these premises? Yes / No

If no – please complete the following: Occupier's Name:

Name of individual to sign occupiers consent (if different):

Principal Business Office

Street address (not a PO Box):

State & Postcode:

Officeholders' Information * If there is not enough space, please add further pages as appropriate.

(1) Last Name:

First & Middle Names:

Former/Maiden Name:

Residential Address:

DOB: / / Town/City of Birth:

State/Country of Birth:

Number of shares (If applicable):

Director / Secretary / Public Officer / Shareholder

(2) Last Name:

First & Middle Names:

Former/Maiden Name:

Residential Address:

DOB: / / Town/City of Birth:

State/Country of Birth:

Number of shares (If applicable):

Director / Secretary / Public Officer / Shareholder

(3) Last Name:

First & Middle Names:

Former/Maiden Name:

Residential Address:

DOB: / / Town/City of Birth:

State/Country of Birth:



Number of shares (If applicable):

Director / Secretary / Public Officer / Shareholder

(4) Last Name:

First & Middle Names:

Former/Maiden Name:

Residential Address:

DOB: / / Town/City of Birth:

State/Country of Birth:

Number of shares (If applicable):

Director / Secretary / Public Officer / Shareholder

NB: Where a company appoints a sole company director, it is recommended that the director also be appointed as the Public Officer/ Company Secretary to ensure that documents can be executed as per S.127 of the Corporations Act. 4