



**It's that simple!**

New Fund Client Engagement Form  
- Individual Trustee

## FUND DETAILS

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### Fund Name

Please confirm what you would like to call your fund. There are no statutory naming standards which apply to self-managed super funds, so it is possible two funds will have the same name. The ABN will work as the unique statutory identifier.

- I/we would like ExpertSuper™ Pty Ltd to establish a Macquarie Bank Account  
OR
- I/we would like to establish our own bank account AND
- I/we wish to register the fund for GST

## STATEMENT OF ADVICE

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- I/we confirm I/we have received a Statement of Advice (SOA) for the establishment of an SMSF and attach a copy.
- I/we confirm I/we have not received a Statement of Advice (SOA) and wish to engage ExpertSuper™ Pty Ltd to prepare this at a cost of \$695.
- I/we confirm I/we have not received a Statement of Advice (SOA) and do not wish to obtain one. I/we understand and accept the trustees are solely responsible for making the decision to establish the fund and instruct ExpertSuper™ Pty Ltd to execute only.

## PAYMENT DETAILS

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Please arrange payment of the fund establishment fee of **\$695** via one of the two below methods. Once payment is received we will establish your SMSF.

- Credit Card  
To pay by credit card, please call us.
- Electronic Funds Transfer (EFT)  
Account Name: ExpertSuper Pty Ltd  
BSB: 033 165  
Account Number: 380 890  
Description: Please quote your super fund name you elect on page 1 as your reference.

## TRUSTEE DETAILS

### Trustee One (Please make this your key contact)

Member (tick if YES)

Salutation Mr  Mrs  Ms  Miss  Dr

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment

Number and Street

City

State

Post Code

Date of Birth

Tax File Number

Telephone Number

Email Address

### Trustee Two

Member (tick if YES)

Salutation Mr  Mrs  Ms  Miss  Dr

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment

Number and Street

City

State

Post Code

Date of Birth

Tax File Number

Telephone Number

Email Address

## TRUSTEE DETAILS CONTINUED

### Trustee Three

Member (tick if YES)

Salutation Mr  Mrs  Ms  Miss  Dr

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment

Number and Street

City

State

Post Code

Date of Birth

Tax File Number

Telephone Number

Email Address

### Trustee Four

Member (tick if YES)

Salutation Mr  Mrs  Ms  Miss  Dr

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment

Number and Street

City

State

Post Code

Date of Birth

Tax File Number

Telephone Number

Email Address

## ADVISERS DETAILS

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Salutation    Mr    Mrs    Ms    Miss

Business Names

Given Name

Surname

Unit/Suite

Number and Street

City

State

Post Code

Telephone Number

Fax Number

Email Address

I consent to you discussing my superannuation matters direct with my adviser (tick if YES)   

I consent to my adviser having online access to the reporting portal (tick if YES)   

## IDENTIFICATION

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We need identification for each fund Trustee.

Please copy and provide along with this form either both sides of your Drivers Licence or the ID page of your passport.

## DECLARATION

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By applying our signatures below, we confirm the following;

- I/we engage ExpertSuper™ Pty Ltd (**ExpertSuper™**) for all services outlined at [www.expert-super.com.au](http://www.expert-super.com.au).
- I/we have accessed, read and understood the ExpertSuper™ terms and conditions (**Terms**) which have been provided to me and are available at [www.expert-super.com.au](http://www.expert-super.com.au).
- I/We agree to be bound by the Terms and any variation of the Terms.
- I/We have read and understood the Fee Schedule provided to us and which is available at [www.expert-super.com.au](http://www.expert-super.com.au).
- All information provided in this form is true and correct.
- I/We consent to the collection, use and disclosure of personal information by ExpertSuper™ in accordance with the ExpertSuper™ Privacy Policy located on [www.expert-super.com.au](http://www.expert-super.com.au).

Date //

Trustee 1

Date //

Trustee 2

Date //

Trustee 3

Date //

Trustee 4