

Trust Deed Service

By completing this form, you will provide all the information we need in order to provide you with a trust deed for a new self managed superannuation fund. As part of our service, we:

- provide a Trust Deed for the Fund (developed in conjunction with a lawyer specialising in estate planning and specific to self managed superannuation funds); and
- present the Trust Deed in a leather bound folder with our SMSF Guide.

The cost of this service is **\$440** (including GST). If Heffron is also facilitating the establishment of a trustee company the total cost (including fund trust deed) is **\$1,155** (including GST). Please see payment options below.

Confirmation and Acceptance of Terms

I confirm that the information on this form is correct and I have completed the payment details below. *Please note that payment must accompany all requests* (an invoice will be provided in due course).

Full Name:

Invoice in the name of:

Signature:

Payment Details

Please find a cheque attached

A Direct Debit agreement is in place in the name of:.....

Account Holder's Signature:

Please charge the following credit card:

MasterCard Visa **Amount:**

Cardholder's full name:

Card Number: _ _ _ _ / _ _ _ _ / _ _ _ _ / _ _ _ _ Expiry Date: _ _ / _ _

Cardholder's Signature:

Section A: Contact Details

Person Ordering the Service – documents (hard and soft copy) will be forwarded to this person.

Full Name:

Name of Firm:

Postal Address:

Contact Number: Fax:

Email:

Section B: Fund and Trustee Details

Name of Fund:

Commencement Date (if you wish to specify, otherwise leave blank):/...../.....

Please Indicate Trustee Type (circle) - Corporate Trustee or Individual Trustees

Please tick this box if you would like Heffron to facilitate the establishment of a sole purpose superannuation fund trustee company. **Please note two alternate names for the company below and the place of birth of each Trustee Director.**

Trustee Company Name:

Alternate Trustee Company Name (if applicable):

Place of Birth of each Trustee Director.....

ACN: TFN:

Date of Incorporation (if no TFN provided):

Address of Registered Office:

Section C: Member Details – If there are more than two members/trustees please copy this page.

Member 1

Title: Mr/Mrs/Miss/Ms/Dr Sex: Male/Female

First Name: Middle Name:

Surname:

Street Address:

.....

Date of Birth:/...../..... TFN:

Please indicate: a member of the Fund? a trustee (or a director of a trustee company)?

Member 2

Title: Mr/Mrs/Miss/Ms/Dr Sex: Male/Female

First Name: Middle Name:

Surname:

Street Address:

.....

Date of Birth:/...../..... TFN:

Please indicate: a member of the Fund? a trustee (or a director of a trustee company)?

Section D: Trustee Declaration – If there are more than two trustees please copy this page.

All trustees (or directors of the trustee company) must sign this declaration to authorise Heffron to establish the Fund.

Authorisation to Establish

I/We the trustee(s) or director(s)/secretary of the corporate trustee hereby authorise Heffron to establish a self managed superannuation fund trust deed for us with the information provided to them for this purpose.

I/We understand that various other documents are required in order to complete the establishment of the Fund, however, I/we or my/our adviser will be attending to these documents.

I/We understand that unless we have specifically obtained a Statement of Advice from Heffron recommending the establishment of a self managed superannuation fund, Heffron has not reviewed my/our circumstances to determine whether or not such a fund is appropriate and they have simply established the fund in accordance with my/our instructions or instructions from my/our adviser(s).

Name (Trustee/Director 1):

Signature:

Name (Trustee/Director 2):

Signature: