

APPLICATION FORM

Self Managed Superannuation Fund (SMSF)–Limited Recourse Borrowing

Please read the following before completing this application form.

Important information

By completing and submitting the form you confirm as follows:

1. the trustee of the SMSF (borrower) is either one or more individuals or a company;
2. it is the purchaser's responsibility to ensure that the information supplied is correct;
3. the trust deed must contain clauses that allow the SMSF to borrow money, charge the SMSF's assets and appoint a custodian - please attach a copy of the trust deed to the form;
4. if new documents have to be prepared as a result of errors in the information a further fee will be payable; and
5. stamp duty may apply in relation to this product. McInnes Wilson Lawyers is not liable for either paying the stamp duty or arranging for lodgment of the documents for stamping unless otherwise agreed.

If you have any questions about completing the application form please contact:

Taryn Hartley

Principal

Phone: (07) 3014 6513

Email: thartley@mcw.com.au

Emily Ryan

Solicitor

Phone: (07) 3014 6581

Email: eryan@mcw.com.au

By completing and submitting the form you confirm as follows:

- a. It is the purchaser’s responsibility to ensure that the information supplied is correct.
- b. If new documents have to be prepared as a result of errors in the information a further fee will be payable.

Please ensure you complete all details below, and contact us with any questions you have prior to submitting the form.

PRICES

All prices are for email delivery only. Please mark the relevant box if documents are required in hard copy

Package one – no loan documents and no advice including: \$500 (plus GST)

- (a) Security Trust;
- (b) Trustee resolutions.

Package two – loan documents and no advice including: \$2,000 – \$2,500 (plus GST)

- (a) Security Trust;
- (b) Trustee resolutions;
- (c) Loan Agreement;
- (d) Mortgage documents.

Package three – letter of advice and no loan documents including: \$2,000 – \$2,500 (plus GST)

- (a) Security Trust;
- (b) Trustee resolutions;
- (c) Letter of advice outlining structure (e.g. obligations under SISR, income tax including CGT).

Conveyance documents – related party vendor and lender \$750 - \$1,000 (plus GST and outlays)

Conveyance documents – non-related party vendor or lender (e.g. bank) \$1,200 - \$1,400 (plus GST and outlays)

Total Price \$

Documents in hard copy

Express Post - \$15

Courier - TBC

PURCHASER/ADVISER’S DETAILS

Firm name

Contact name

Telephone

Fax

Email address

Delivery address for documents

Suburb/City

State

Postcode

SUPERANNUATION FUND DETAILS

Name of Fund

ABN

Establishment date

CORPORATE TRUSTEE OF SMSF (IF APPLICABLE)

Name of Corporate Trustee

ACN

ABN

Registered Office Address

Suburb/City

State

Postcode

List the names of ALL directors

- 1.
- 2.
- 3.
- 4.

INDIVIDUAL TRUSTEES OF SMSF (IF APPLICABLE) AND MEMBERS DETAILS

Individual trustee 1

Full Name

Tax File Number

Residential Address

Suburb/City

State

Postcode

Date of Birth

Occupation

This person is a: Superannuation Fund Trustee Member

Individual trustee 2

Full Name

Tax File Number

Residential Address

Suburb/City

State

Postcode

Date of Birth

Occupation

This person is a: Superannuation Fund Trustee Member

Individual trustee 3

Full Name

Tax File Number

Residential Address

Suburb/City

State

Postcode

Date of Birth

Occupation

This person is a: Superannuation Fund Trustee Member

Individual trustee 4

Full Name

Tax File Number

Residential Address

Suburb/City

State

Postcode

Date of Birth

Occupation

This person is a: Superannuation Fund Trustee Member

SECURITY TRUST DETAILS

Name of Security Trust

CORPORATE TRUSTEE OF SECURITY TRUST (IF APPLICABLE)

Name of Corporate Trustee

ACN

ABN

Registered Office Address

Suburb/City

State

Postcode

List the names of ALL directors

- 1.
- 2.
- 3.
- 4.

Would you like McInnes Wilson Lawyers to incorporate the above company? Yes No

If yes, have you completed an Application Form for Proprietary Company Limited by Shares?
See: <http://www.mcwonline.com.au/companies.aspx> Yes No

INDIVIDUAL TRUSTEE (IF APPLICABLE)

List the names of ALL individuals trustees

- 1.
- 2.
- 3.
- 4.

DETAILS OF THE LENDING ARRANGEMENT

Coporate lender (if applicable)

Full name of Corporate Lender

ACN/ABN

Registered office address

Suburb/City

State

Postcode

Is lender acting as trustee of a trust? Yes No If yes, Name of trust

Individual lenders (if applicable)

Full name

Address

Suburb/City

State

Postcode

Is lender acting as trustee of a trust? Yes No If yes, Name of trust

Full name

Address

Suburb/City

State

Postcode

Is lender acting as trustee of a trust? Yes No

If yes, Name of trust

LOAN DETAILS

Amount of money being lent \$

Duration of loan

Years

Months

Jurisdiction

Settlement Date

Details of Property (e.g. address and property description)

Interest Rate (e.g. benchmark interest rate, safe harbour rate)

% NOTE: If there is a related party leader and Div 7A minimum terms are to apply please advise

RETURNING THIS FORM

After completing this form please either:

- print, sign, and fax it to McInnes Wilson Lawyers at (07) 3221 2921; or
- print, sign, scan, and email it to McInnes Wilson Lawyers at mcwonline@mcw.com.au; or

To print this form for signing click here:

To email this form to McInnes Wilson Lawyers, after confirming instructions below, click here:

CONFIRMATION OF INSTRUCTIONS

The trustees or members or the purchaser/adviser on behalf of the trustees or members agree that all necessary consent have been obtained and that no legal advice has been given in relation to the establishment of the limited recourse borrowing arrangement by McInnes Wilson Lawyers. In particular, McInnes Wilson Lawyers has not provided legal advice to as to whether this structure is compliant with *Superannuation Industry (Supervision) Act 1993* (Cth) requirements.

| | | | |
|------|-------------------|----|------|
| Name | Sign/Confirmation | or | Date |
| Name | Sign/Confirmation | or | Date |
| Name | Sign/Confirmation | or | Date |
| Name | Sign/Confirmation | or | Date |

CREDIT CARD PAYMENTS

Please debit the following credit card for the supply of goods and services indicated on this application form.

Note: Payment by credit card will incur a fee of 1.07% (incl GST) for VISA and Mastercard, and 3% (incl GST) for AMEX, on the GST inclusive price.

Credit card:

Visa Mastercard American Express

Total Remitted: \$

Expiry date:

plus credit card fee specified above

Cardholder's Name:

Card Number:

Cardholder's Signature:

Date: