



The Professionals
Patricia Holdings
Company Incorporations & Trust Deeds

ORDER FORM – CONVERT TO/FROM
SUPERANNUATION TRUSTEE COMPANY

Firm / Person Placing Order

Firm Name: Contact Name:
Delivery Address (no PO boxes):
Suburb: State: Postcode:.....
Phone: Email:.....

Conversion Type

Convert Company type from: Proprietary Company Superannuation Trustee Company

Convert Company type to: Proprietary Company Superannuation Trustee Company

Lodgement Options

Converting to/from *Superannuation Trustee Company* to/from *Proprietary Company*

Online \$203.50 Send paper forms for signing \$236.50

How Will Payment Be Made

Account number:
 Direct Deposit: BSB: 062 210 Acct. 1036 0658 (Please use the Company name as reference)
 Cheque (Must be cleared before processing and made payable to Patricia Holdings)
 Credit Card Number Expiry Date
Card Holder Name
Type of Card: MasterCard Visa Amex (NB: Amex will incur 3.03% incl. GST fee)

Signature:.....

Company Details

Company Name:.....
A.C.N. :.....
Registered Office Address:.....
.....
Date of Members Meeting:.....

First Member's Name:.....

Authorised Representative if Member is a Company

Second Member's Name:.....

Authorised Representative if Member is a Company

Names of other Members (if any).....

.....

.....

.....

.....

Name of Chairperson:

Please attach a copy of the latest Company Statement from ASIC.



THINGS TO KNOW

1. **NO LEGAL, FINANCIAL OR TAX ADVICE**

We do not provide legal, financial or taxation advice and therefore take no responsibility for these matters. You should consult your lawyer, financial advisor or accountant before placing an order with us.

2. **NAME ON TAX INVOICE (for Clients with Accounts)**

Please note that you are our client and tax invoices are in your name and it is you we extend credit to, not your client. We cannot and will not alter the tax invoice from you to your client *after* your order has been processed. Should you want the tax invoice in the name of your client ***please advise us beforehand*** so it is not on your account. *We shall require cleared funds in payment prior to processing your order as we do not extend credit to clients of our clients.* **The name on the tax invoice determines the debtor.**

3. **TERMS OF TRADE (for Clients with Accounts)**

We extend thirty days terms of trade to practising solicitors, financial planners and accountants but not to their clients. We require cleared funds from private clients before we process the order. See 2 above re name on Tax Invoice. Where accounts are paid after the time of order using credit card, we charge an admin fee of 2.5% (incl. GST) on Visa and MasterCard and 3.03% (incl. GST) on Amex.

Whilst most of our clients observe the 30 days terms of trade we extend, please be aware it is company policy to suspend further credit at 45 days.

4. **TERMS OF TRADE (for Private Clients)**

We require cleared funds from private clients before we process the order. American Express (subject to surcharge of 3.03% incl. GST), MasterCard and Visa (not subject to surcharges) accepted. Non-bank cheques are accepted but need to be cleared before your order is processed which may take four business days.