PatriciaHoldings

ORDER FORM –SUPERANNUATION FUND FORM

Firm / Person Placing Order

Firm Name: ..... Contact Name: .....

Delivery Address (no PO boxes): .....

Suburb: ..... State: ..... Postcode:.....

Phone: ..... Email:.....

The SMSF

Desired Name of Trust .....

State of Jurisdiction .....

Please complete "SMSF Details" section on page 2 of this document before submitting.

How Will Payment Be Made

☐ Account number: .....

☐ Direct Deposit: BSB: 062 210 Acct. 1036 0658 (Please use desired Trust 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 ☐

Signature:.....

Trust - Delivery Type

A ☐ $462.00 Please choose ☐ White Folder

A quality bound Trust Register delivered to you via courier.

B ☐ $352.00

A PDF version of the Trust Register delivered to you via email.

A & B ☐ $484.00 Please choose ☐ White Folder

☐ Additional bound copies of Deed ($22.00 each) Number of extra copies: .....

Package Deals (leave blank if not part of a package)
(AAT – Asset Acquisition Trust) (SMSF – Self Managed Superannuation Fund)

☐ Company + Superannuation Trust (SMSF)
Couriered: $1,571.00

☐ Company + Superannuation Trust (SMSF)
Emailed: $1,307.00

☐ 2 Companies + Bare Trust (AAT) + SMSF
Couriered: $3,230.00

☐ 2 Companies + Bare Trust (AAT) + SMSF
Emailed: $2,702.00

Member 1 Name:……

Address:……

……

Member 2 Name:……

Address:……

……

Member 3 Name:……

Address:……

……

Member 4 Name:……

Address:……

……

Member 5 Name:……

Address:……

……

Member 6 Name:……

Address:……

……

Trustee (Please select one of the 3 following options for the Trustee of this Superannuation Fund)

☐ All of the above Members

☐ Company Name:……

Address:……..

A.C.N. ……

☐ The above sole Member plus the below non-Member Trustee

Name:……

Address:……

……..

PatriciaHoldings

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, accountant, or financial advisor before placing an order with us.

2. TERMS OF TRADE (FOR CLIENTS WITH ACCOUNTS)
We extend thirty days terms of trade to approved practising solicitors, financial planners, and accountants, but not to their clients. We require cleared funds from private clients before we process the order (see clauses 3 and 4 below regarding name on Tax Invoice). 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. You will also be liable for any debt recovery expenses relating to the payment of your account.

3. TERMS OF TRADE (FOR PRIVATE CLIENTS)
We require cleared funds from private clients before we process the order. We accept payment via credit card (see clause 5 below for surcharge information), bank transfer and cheque. Funds sent by bank transfer or cheque will need to be cleared before orders are processed which may take up to four business days.

4. NAME ON TAX INVOICE
Please note that if you are our client and tax invoices are in your name, 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 the order is 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 as we do not extend credit to clients of our clients. The name on the tax invoice determines the debtor.

5. REFUNDS
Products and services supplied by us are created to meet the specific requirements of each purchaser and/or client. We provide products and services that cannot be re-sold to another purchaser or client. As a result of this, we do not provide refunds for products or services supplied in good faith according to the request of the purchaser or client.

6. RETURNS
If the product or service is returned/referred to us due to an error on the part of the purchaser or client, and we have complied with the original instructions and directions of the purchaser/client, we reserve the right to levy an additional charge that fairly reflects the time and expertise required to amend the error. We are not responsible for any error or loss due to a purchaser/client's mistake or misunderstanding of the Law.