

SELF MANAGED SUPERANNUATION FUND SET UP CHECKLIST

Outlined below is a checklist of the information needed to complete a SMSF Trust Deed application.

TRUST DETAILS

- Desired name of Trust
- State of Jurisdiction

MEMBER DETAILS

- Full name(s)
- Residential address(es)

SMSF STRUCTURE

- Is your Trustee:
 - All of the members of your SMSF; or
 - A Company (with all Members being Directors [unless disqualified]); or
 - A sole member & an individual non-member

TRUSTEE DETAILS

- Full name(s)
- Address(es)
- A.C.N. if company

If you have any questions about this list, please contact our friendly staff on 02 9953 2399.