



CHARTERED ACCOUNTANTS
AUSTRALIA + NEW ZEALAND

SMSF APPLICATION & ADMINISTRATION

FUND DETAILS

SMSF Name (e.g. ABC Family Superannuation Fund)

CORPORATE TRUSTEE DETAILS

SMSF Corporate Trustee Name (e.g. ABC Family Superannuation Pty Ltd)

CUSTODIAN DETAILS (SMSF Property Requirement)

SMSF Property Custodian Name (e.g. ABC Family Property Custodian Pty Ltd)

MEMBER 1 DETAILS

Last Name

Given Name(s)

Place of Birth (Suburb & Country) **(Required)**

Date of Birth

Address

Mobile Number

Email Address

Tax File Number **(Required)**

MEMBER 2 DETAILS

Last Name

Given Name(s)

Place of Birth (Suburb) (Required)

Date of Birth

Address

Mobile Number

Email Address

Tax File Number (Required)

Preferred Contact

Preferred Contact Method

Member 1

Member 2

Phone

Email

LINKED BANK ACCOUNT DETAILS

(This is a requirement to meet AML & CTF Act regulations. This is required to establish a SMSF bank account)

Account Name

BSB

Account Number

I wish to engage Mosman Accountants as administrator of the SMSF and Aussie Wealth Super Pty Ltd to obtain the necessary statutory registrations.

I acknowledge the establishment cost of a SMSF with a corporate trustee is \$1,250 and the cost of establishment of a custodial trust to hold property for the SMSF is \$990 and I authorise the fee to be paid by the SMSF when the SMSF is established.

I acknowledge the annual costs for preparation of tax returns and compliancy audits for the SMSF is \$1,550 and I authorise the fee to be paid by the SMSF.

Member 1 Signature

Member 2 Signature