BINETTERVALE
PREMIUM DOCUMENT SERVICES

INSTRUCTION SHEET TO ESTABLISH A SELF MANAGED SUPERANNUATION FUND WITH 2 TO 4 MEMBERS

Delivery Instructions

	Please email documents to:

	Please send completed documents to the following address:

Payment Instructions

$450 by post or $350 by email	
	Please send me an account

	Please charge my credit card

Credit Card	☐ **Bankcard** ☐ **Visa** ☐ **Mastercard**
(We are unable to accept American Express or Diners)	
Card No.	
Expiry Date	_____ / _____
Credit Card CCV No.	_____
(Last 3 digits after card no. on front / reverse of card – we cannot process your payment without this number)	
Name on Card	
Amount	**$**
Cardholder's Signature	
Where you pay our account by credit card, a surcharge equal to the amount of the merchant's fee may be added and you agree to pay such surcharge.	

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Sydney NSW 2000
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PREMIUM DOCUMENT SERVICES

Please print clearly

MEMBER 1

Name of the First Member

Address of the First Member

Date of Birth of the First Member

Name of the First Member's Beneficiary (in the event of the Member's death)

Address of the First Member's Beneficiary

Percentage of Death Benefit attributable to each Beneficiary

%

MEMBER 2

Name of the Second Member

Address of the Second Member

Date of Birth of the Second Member

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Name of the Second Member's Beneficiary (in the event of the Member's death)

Address of the Second Member's Beneficiary

Percentage of Death Benefit attributable to each Beneficiary

%

MEMBER 3

Name of the Third Member

Address of the Third Member

Date of Birth of the Third Member

Name of the Third Member's Beneficiary (in the event of the Member's death)

Address of the Third Member's Beneficiary

Percentage of Death Benefit attributable to each Beneficiary

%

MEMBER 4

Name of the Fourth Member

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Address of the Fourth Member

Date of Birth of the Fourth Member

Name of the Fourth Member's Beneficiary (in the event of the Member's death)

Address of the Fourth Member's Beneficiary

Percentage of Death Benefit attributable to each Beneficiary

%

Name of the Superannuation Fund

The **Fund**

Complete only if Corporate Trustee

Name of Trustee Company

All Members must be Directors of the trustee company and all Directors must be Members.

ACN of Trustee Company

Address of Trustee Company

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Are **all** the Members of the fund "**relatives**"? **YES / NO**

If NO – is any Member an **employee** of another

Member of the Fund? **YES / NO**

Definition of "**relative**" [**Please note** - "spouse" includes de facto]:

For the purposes of this form, *relative* in relation to an individual means:

(i) a parent, child, grandparent, grandchild, sibling, aunt, uncle, great-aunt, great-uncle, niece, nephew, first cousin or second cousin of the individual or of his or her spouse or former spouse; or

(ii) another individual having such a relationship to the individual or to his or her spouse or former spouse because of adoption or remarriage; or

(iii) the spouse or former spouse of the individual, or of any individual referred to in paragraph (a) or (b).

Definition of "**employee**":

Employee has its normal meaning but is also extended to include the following situations:

The Member is an employee of the other director [corporate trustee] or the other trustee [individual trustees] ("the other Trustee") where:

1. the employer of the Member (the "Employer") has contributed to the Fund and is a relative of the other Trustee;
2. the Employer is a body corporate and the other Trustee or a relative of the other Trustee is a director of the Employer;
3. the Employer is a body corporate, and:
   (a) is a holding company or subsidiary or "sister" subsidiary of the body corporate referred to in point 2 above;
   (b) is a trustee of a trust of which the other Trustee or a relative of the other Trustee is a beneficiary.
4. the Employer is a partnership, and:
   (a) the other Trustee or a relative of the other Trustee is a partner in the partnership;
   (b) the other Trustee or a relative of the other Trustee is a director of a body corporate that is a partner of the partnership;
   (c) the other Trustee or a relative of the other Trustee is a beneficiary of a trust, if the trustee of the trust is a partner in the partnership.

BUT if the Member is a relative of:

(i) any other director of the employer sponsor, where the employer sponsor is a company;

(ii) any other partner of the employer sponsor, a director of a body corporate that is a partner in a partnership or a beneficiary of a trust if the trustee of the trust is a partner in the partnership, where the employer sponsor is a partnership;

(iii) any other beneficiary of the employer sponsor where the employer sponsor is a trust;

then that Member will <u>not</u> be deemed to be an employee under this extended definition.

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