

The Portfolio Service SMSF

Holding trust trustee company registration

Please complete this form if you would like us to help you set up a company for the corporate trustee of the holding trust.

1. Company details

Proposed holding trust trustee company name(s)

1.	
2.	
3.	

Preferred State or Territory (will be SA unless advised)	
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Full registered office address:

Street address			
Suburb	State	Postcode	

Does the company occupy the registered office?

No - if no, name of occupier

Yes

2. Details of officer(s) and shareholder(s)

All parties listed below will be appointed a director and issued with one ordinary share.

First named person will be the primary contact

Surname	Given name(s)	
Street address		
Suburb	State	Postcode
Date of birth:	Place of birth:	
Occupation:		

Surname	Given name(s)	
Street address		
Suburb	State	Postcode
Date of birth:	Place of birth:	
Occupation:		

Surname	Given name(s)	
Street address		
Suburb	State	Postcode
Date of birth:	Place of birth:	
Occupation:		

Surname	Given name(s)	
Street address		
Suburb	State	Postcode
Date of birth:	Place of birth:	
Occupation:		

3. Declaration

I/we the applicant(s) hereby request AET to undertake the process of establishing a corporate trustee for the fund and request AET make an application for company registration as my/our agent. I/we acknowledge that I/we are also entering into corporate secretarial services and Australian Executor Trustees Limited will be listed as the registered agent for such services.

Signed by

Name (please print)	
Signature	
Date	

Name (please print)	
Signature	
Date	

Name (please print)	
Signature	
Date	

Name (please print)	
Signature	
Date	

Please return to:
Email: forms@aetlimited.com.au
Fax: 1800 781 166
Or post
The Portfolio Service SMSF
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