

The Portfolio Service SMSF

SMSF holding trust

Please complete this form if you would like to commence a holding trust for your fund.

1. Name of fund

2. Details of fund members

Please provide a copy of the fund's trust deed if the trust deed was not prepared by us.

Member 1

Name

Street address

Suburb

State

Postcode

Member 2

Name

Street address

Suburb

State

Postcode

Member 3

Name

Street address

Suburb

State

Postcode

Member 4

Name

Street address

Suburb

State

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Postcode

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3. Details of fund trustee

Most lenders require the fund to have a corporate trustee. If your lender permits individual trustees, please provide details of the individual trustees.

Please provide a copy of the ASIC company search of the corporate trustee of the fund.

Name of corporate trustee

ACN of the corporate trustee

Address of corporate trustee

4. Information in relation to the holding trust

Name of proposed holding trust

5. Information in relation to the holding trust trustee

Please provide a copy of the ASIC company search of the holding trust trustee if we are not incorporating (attach a completed 'Trustee company registration form' if we are incorporating).

Name of holding trust trustee

ACN of the holding trust trustee

Address of the holding trust trustee

6. Information in relation to the asset

Asset description

For property - address of the property to be purchased

7. Additional information

Proposed lender

Details of settlor (Queensland only) - this person must not be a beneficiary or a trustee of the holding trust

Name

Address

Signed by

Trustee/director name	
Trustee/director signature	
Date	

Trustee/director name	
Trustee/director signature	
Date	

Trustee/director name	
Trustee/director signature	
Date	

Trustee/director name	
Trustee/director signature	
Date	

Please return to us by:

Email: forms@aetlimited.com.au

Fax: 1800 781 166

Post: **The Portfolio Service SMSF
Administration Services
GPO Box 546
Adelaide SA 5001**

If you require further information, or have any questions, please call our **client advisory services team** on **1800 221 151** or e-mail **forms@aetlimited.com.au**