

The Portfolio Service SMSF

SMSF trustee company registration

Please complete this form if you would like us to help you set up a company to be the corporate trustee

1. Company details

Proposed company name(s)

1.	
2.	
3.	

Is this name a registered business name owned by the shareholder(s)?

 No

 Yes, please provide the State or Territory in which it was registered:

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

Full principal place of business address:

Street address			
Suburb	State	Postcode	

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:		

Is the director also applying to be a member of the fund?

 No Yes

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

Is the director also applying to be a member of the fund?

 No Yes

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

Is the director also applying to be a member of the fund?

 No Yes

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

Is the director also applying to be a member of the fund?

No

Yes

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 781166

Or post

The Portfolio Service SMSF

Administration Services

GPO Box 546

Adelaide SA 5001