



**It's that simple!**

Existing Fund Client Engagement Form  
- Corporate Trustee

## FUND DETAILS

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Fund Name

ABN

TFN

- ☐ The fund is registered for GST
- ☐ The fund is paying a pension

### Bank Account Details

Financial Institution

BSB

Account Number

What is the first financial year we are to prepare?

## COMPANY DETAILS

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Name

ACN

Registered Address

Number and Street

City

State

Post Code

- ☐ I/we wish for ExpertSuper™ Pty Ltd to be the registered address for the company and prepare the annual company review. I/We understand there is an additional fee for this service as per the Fee Schedule found at [www.expert-super.com.au](http://www.expert-super.com.au) (PLEASE NOTE: We can only be the registered address for Special Purpose Corporate Trustees.)

## DIRECTOR(S) DETAILS

### Director One (Please list details of your key contact)

Member (tick if YES)

☐

Salutation      Mr ☐   Mrs ☐   Ms ☐   Miss ☐   Dr ☐

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment

Number and Street

City

State

Post Code

Date of Birth

Tax File Number

Telephone Number

Email Address

City of Birth

Country of Birth

### Director Two

Member (tick if YES)

☐

Salutation      Mr ☐   Mrs ☐   Ms ☐   Miss ☐   Dr ☐

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment

Number and Street

City

State

Post Code

Date of Birth

Tax File Number

Telephone Number

Email Address

City of Birth

Country of Birth

## DIRECTOR(S) DETAILS CONTINUED

### Director Three

Member (tick if YES)

☐

Salutation Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment

Number and Street

City

State

Post Code

Date of Birth

Tax File Number

Telephone Number

Email Address

City of Birth

Country of Birth

### Director Four

Member (tick if YES)

☐

Salutation Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐

Given Name(s)

Surname

Residential Address (cannot be a PO Box)

Unit/Apartment

Number and Street

City

State

Post Code

Date of Birth

Tax File Number

Telephone Number

Email Address

City of Birth

Country of Birth

## ADVISER DETAILS

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Salutation      Mr ☐   Mrs ☐   Ms ☐   Miss ☐

Business Names

Given Name

Surname

Unit/Suite

Number and Street

City

State

Post Code

Telephone Number

Fax Number

Email Address

I consent to you discussing my superannuation matters direct with my adviser    (tick if YES)    ☐

I consent to my adviser having online access to the reporting portal                      (tick if YES)    ☐

## IDENTIFICATION

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We need identification for each fund Trustee Director/Member.

Please copy and provide along with this form either both sides of your Drivers Licence or the ID page of your passport.

## DECLARATION

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By applying my/our signatures below, I/we confirm that:

- I/we engage ExpertSuper™ Pty Ltd (**ExpertSuper™**) for all services outlined at [www.expert-super.com.au](http://www.expert-super.com.au).
- I/we have accessed, read and understood the ExpertSuper™ terms and conditions (**Terms**) which have been provided to me and are available at [www.expert-super.com.au](http://www.expert-super.com.au).
- I/We agree to be bound by the Terms and any variation of the Terms.
- I/We have read and understood the Fee Schedule provided to us and which is available at [www.expert-super.com.au](http://www.expert-super.com.au).
- All information provided in this form is true and correct.
- I/We consent to the collection, use and disclosure of personal information by ExpertSuper™ in accordance with the ExpertSuper™ Privacy Policy located on [www.expert-super.com.au](http://www.expert-super.com.au).
- ExpertSuper™ Pty Ltd is authorised to contact the Fund's previous administrator or accountant to obtain the information required to administer the Fund.
- I/We expressly authorise ExpertSuper™ Pty Ltd to act on the instructions of any one trustee [director of the trustee] of the SMSF without the need to confirm instructions with any other trustee [director].

Director 1

Date //

Director 2

Date //

Director 3

Date //

Director 4

Date //