NEW SELF MANAGED SUPER FUND ORDER FORM

Establishment of new Self Managed Superannuation Fund
All prices inclusive of GST and disbursements

Coulter Legal

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Please email the completed form to clcorporate@coulterlegal.com.au

Instructing Business:	
Contact Person:	
Address:	
Telephone:	
Facsimile:	
Email:	
Name of Fund:	

Employer of Other Person Establishing the Fund:	Name:	
	ACN: (if applicable)	
	Address:	
	Date of Birth: (if applicable)	
	Place of Birth: (if applicable)	
	Occupation: (if applicable)	
	Is this person or entity an employer of any member of the Fund?	Yes ☐ No ☐

Jurisdiction:	VIC ☐ WA ☐ TAS ☐ NSW ☐ QLD ☐ ACT ☐ NT ☐

Member 1 Details:	Name:	
	Address:	
	Date of Birth:	
	Place of Birth:	
	Occupation:	
	TFN:	

Binding Death Beneficiary of Member 1:	Name:	
	Relationship to Member:	
	Proportion of benefit: (%)	%

Member 2 Details:	Name:	
	Address:	
	Date of Birth:	
	Place of Birth:	
	Occupation:	
	TFN:	
Binding Death Beneficiary of Member 2:	Name:	
	Relationship to Member:	
	Proportion of benefit: (%)	%

Will the Members be the Trustees of the Fund?	Yes ☐ No ☐

Corporate Trustee Details: **(if applicable)**	Name:	
	ACN:	
	Address:	
	Director 1: Name:	
	Address:	
	Director 2: Name:	
	Address:	
	Form of Execution?	Common Seal ☐ 2 Directors ☐ Sole Director and Secretary ☐

Specific Instructions:	Physical or Electronic Register:

PAYMENT DETAILS: Please debit the following credit card for full payment of the establishment of the above self managed superannuation fund.

Card Type	Visa		MasterCard			**CVC Number**						
Card Number								**Expiry Date**				
Name on Card					**Signature**							

Credit Card details will be kept only for the purpose of processing payment.
Please note that a 1% surcharge applies to all payments made by credit card.
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Liability limited by a scheme approved under Professional Standards Legislation

1. Prices quoted are effective 1 July 2025. All prices are GST inclusive. Prices subject to change at any time.
2. It is the responsibility of the instructing party at all times to ensure that the information provided is accurate.
3. If new documents have to be prepared as a result of errors in the information given then a further fee will be charged in accordance with the time taken to rectify the error.
4. The Corporate Services Division of Coulter Legal Pty Ltd does not offer any legal advice in the process of drafting the documents requested. If the instructing party requires legal advice then they may make an appointment with one of our Commercial Lawyers.
5. The documents received will be in a standard form prepared by Solicitors at Coulter Legal Pty Ltd.
6. All documentation will be prepared on the instructions contained in the order form. The Corporate Services Division of Coulter Legal Pty Ltd has provided no advice to the parties in relation to establishing the particular entity. The Corporate Services Division is not licensed to provide Financial Product ("FP") advice under the Corporations Act 2001 and you should consider taking advice from the holder of an Australian Financial Services Licence before making a decision on an FP.