

Self Managed Superannuation Fund

Initial Enquiry / Instruction Form

Address: 248 Oxford Street
LEEDERVILLE WA 6007

Enquiries: Telephone: (08) 9443 2544
Facsimile: (08) 9444 3808
E-mail: murray.colvin@irdi.com.au

Postal Address: PO Box 95, Leederville WA 6902

Please email the completed form to murray.colvin@irdi.com.au

Your Details

Firm or name

Address

Contact Phone Email:

Self Managed Superannuation Fund Details

Name of Fund

ABN

Member Details

1. Full Name	<input type="text"/>	2. Full Name	<input type="text"/>
Address	<input type="text"/>	Address	<input type="text"/>
	<input type="text"/>		<input type="text"/>

What are looking to do? (Please refer to the Checklist of Documents for documentation required)

		Please complete the following questions
Update the Governing Rules of the SMSF	<input type="checkbox"/>	1
Change the Trustee of the SMSF	<input type="checkbox"/>	1, 2 & 3
Transfer property as a result of the change in Trustee	<input type="checkbox"/>	1 – 5
Transfer property from Member(s) to Trustee	<input type="checkbox"/>	1, 4 & 5
Transfer property from Trustee to Member(s)	<input type="checkbox"/>	1, 4 & 5
Transfer property from Security Trustee to SMSF Trustee	<input type="checkbox"/>	1, 4 & 5
Create a Security Trust Deed (with security documentation)	<input type="checkbox"/>	1, 4 & 5
Create a Security Trust Deed (without security documentation)	<input type="checkbox"/>	1, 4 & 5

Are you:

- Requesting a quote?
- Instructing IRDI Legal to commence work.

A file will be opened for you and a Costs Agreement provided.

If further information / documentation is required we will be in contact prior to providing you with the initial draft documentation

1. Trustee Details (if not the same as Member(s))

Full Name	
Address/Registered Office	
ACN (if applicable)	
Full Name	
Address/Registered Office	
ACN (if applicable)	

2. New Trustee Details (if applicable)

Full Name	
Address/Registered Office	
ACN (if applicable)	

3. New Trustee Details (if IRDI Legal incorporating company)

Name	
Address/Registered Office	
Are the Members of the SMSF the Directors and Shareholders of the new company?	<input type="checkbox"/> Yes <input type="checkbox"/> No If no, please provide details:
Director 1's birth details:	Date of birth: Place of birth:
Director 2's birth details:	Date of birth: Place of birth:

4. Property Details

Street address of property	1.
	2.
	3.
	4.

5. GST

Please tick only those of the following who are registered for GST

- Family Trust
 Beneficiaries / Members
 SMSF

Further Information / Instructions

Please advise of any further instructions:

Checklist of documents to be provided with instructions

	Update Governing Rules	Change of Trustee	Creating a Security Trustee	Transfer of property
SMSF Deed and any amending deeds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Latest Financial Statements of the SMSF		<input type="checkbox"/>		<input type="checkbox"/>
Stamped Offer and Acceptance showing the property was purchased on behalf of the SMSF		<input type="checkbox"/>		<input type="checkbox"/>
<i>Note: If a stamped O&A cannot be located, we will advise what other documentation is required</i>				<i>Note: If the property is to be vested out of a Family Trust, please provide a copy of the Trust Deed, any amending deeds and O&A</i>

Who should we contact for further information

- Person named in 'Your Details'
 Accountant
 Other

Name:

Telephone:

Email:

Privacy Act 1988 (Cth) - Personal Information Collection

This firm collects the personal information contained in this form to enable us to deal with the matters the subject of this form and to provide, develop and promote our services as a law firm. If the information collected in this form is not provided, we may not be able to provide our services as effectively or at all. By providing any personal information to us and/or continuing to instruct us, you consent to its collection, use and disclosure in the manner set out in our Privacy Policy unless you advise us otherwise. If you provide information to us about a third party, you agree and confirm that you have provided to that third party sufficient disclosure under the *Privacy Act 1988* (Cth).

We respect the privacy of personal information about individuals that we hold. Please refer to our Privacy Policy on our website at www.irdi.com.au for information about how we collect, use and disclose personal information and, if it concerns you, your rights in relation to it.