



CST Corporate Solutions Pty Ltd

ABN 83 096 444 478
Locked Bag 5009, Narellan NSW 2567
Telephone: 1-300 554 321
Facsimile: 1-300 554 322

SMSF BARE TRUST INSTRUCTIONS

To CST Corporate Solutions Pty Ltd. You are appointed to act as our agent to procure a Deeds and ancillary legal documentation from a solicitor, the particulars for such deeds and legal documents being set out hereunder.

SMSF Fund Name:

- Please provide:
- Bare Trust/Instalment Documents
 - Fully Bound Bare Trust Register
 - New Super Fund (if the SMSF does not already exist)
 - SMSF Rules Update (most lenders require specific clauses in your SMSF rules)
 - New Company as SMSF Trustee (If setting up a fund with a new corporate trustee)
 - New Company as Security (Bare) Trustee
 - Loan Agreement (where there is a non arms length loan to be set up)
 - Change to trustees of SMSF (to corporate trustee)

Applicant Details:

Firm Name:

Contact Person: Phone:

Street Add: Fax:

Postal Add: DX:

Email Address:

Please Deliver to: Street Address / Postal Address / Other:

The applicant hereby accepts full responsibility for any amount payable to CST Corporate Solutions Pty Ltd for the enclosed instructions.

signed: date:

Payment Details:

Chq Encl. Chq in Mail Direct Deposit

or Charge our Credit Card: Bankcard Visa Mastercard Amount:

Card Number: Expiry Date:

name of cardholder signature

DETAILS OF PROPERTY BEING PURCHASED

Address:

Town: State Postcode

CORPORATE SECURITY (BARE) TRUSTEE DETAILS (if any)

Name of Trustee:

A.C.N.

Registered Address: C/- Applicant or

Town: State Postcode

Principal Place of Business: Same as Registered Office Same as 1st Individual shown below

LENDERS DETAILS

NAB The Rock Bendigo Westpac St George Other (detail below)

Name of Lender:

A.C.N.

Address:

Town: State Postcode

Initial Loan Amount: \$

SMSF CORPORATE TRUSTEE DETAILS (if any)

Name of Trustee:

A.C.N.

Registered Address: C/- Applicant or

Town: State Postcode

Principal Place of Business: Same as Registered Office Same as 1st Individual shown below

ASSOCIATED INDIVIDUALS

In this section please include
All the members or directors of the trustee company of the SMSF
All the directors of the Security Trustee

Only complete Date of Birth, Place of Birth & Director's consents if setting up a trustee company as part of this order

Name:

Address:

Town: State Postcode

SMSF trustee/director of trustee (Is this person a trustee of the SMSF) Security trustee/ Director of security trustee (Is this person a security trustee) Loan Guarantor (If guaranteeing the loan)

Date of Birth Place of Birth

I hereby consent to act as a director / secretary / shareholder of the company

..... (Signature)

Name:

Address:

Town: State Postcode

SMSF trustee/director of trustee (Is this person a trustee of the SMSF) Security trustee/ Director of security trustee (Is this person a security trustee) Loan Guarantor (If guaranteeing the loan)

Date of Birth Place of Birth

I hereby consent to act as a director / secretary / shareholder of the company

..... (Signature)

Once completed please fax this order to CST Corporate Solutions Pty Ltd on **1-300 554 322**

Please note: All documents are delivered in PDF format.

If there are more associated individuals please attach an SMSF Bare Trust Instructions Additional Persons form.

More associated individuals attached (Tick if yes)



ADDITIONAL INDIVIDUALS

SMSF Fund Name:

Name:

Address:

Town: State Postcode

SMSF trustee/director of trustee (Is this person a trustee of the SMSF) Security trustee/ Director of security trustee (Is this person a security trustee) Loan Guarantor (If guaranteeing the loan)

Date of Birth Place of Birth

I hereby consent to act as a director / secretary / shareholder of the company

..... (Signature)

Name:

Address:

Town: State Postcode

SMSF trustee/director of trustee (Is this person a trustee of the SMSF) Security trustee/ Director of security trustee (Is this person a security trustee) Loan Guarantor (If guaranteeing the loan)

Date of Birth Place of Birth

I hereby consent to act as a director / secretary / shareholder of the company

..... (Signature)

Name:

Address:

Town: State Postcode

SMSF trustee/director of trustee (Is this person a trustee of the SMSF) Security trustee/ Director of security trustee (Is this person a security trustee) Loan Guarantor (If guaranteeing the loan)

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