



New SMSF Application Information Fields

Note that we cannot commence work until all questions have been answered.

Fund Details

Proposed name – please do not begin the name with “The”

Is the fund to be registered for GST?

Are UK Pension conditions required?

Member/Trustee/Director Details

- Full names including middle names and any prior names
- Date of Birth
- Street Address
- Mobile number
- Email
- Place of Birth
- Director Identification Number (DIN) – if director of corporate trustee
- Tax File Number (TFN)
- Copy of driver’s licence or passport will need to be uploaded with the application.

Trustee

If a company already exists: Company Name/ A.C.N & Registered Address

If we are establishing a new company

- 3 company name preferences
- Add specific occupation, town & country of birth to Personal Details list above
- Names of shareholders, and number of shares
- Which directors are to be company secretary and/or public officer (can be all)

If Individual Trustees – full name of Trustees

Bank Account

If we are establishing a Macquarie Account for the SMSF

- Your adviser company name
- Your Adviser/Company code
- Access level

Document delivery

These documents must be wet signed. Do you want them to be

- Electronically delivered to your office and/or the client for printing and signing
- Hard copy delivered to you
- Hard copy delivered to your client