



Welcome to First Class Super

Please use this New Fund Establishment application form to setup a new Self Managed Superannuation Fund. If you have any questions during the completion of this application form please do not hesitate to contact us.

Your completed application form can be provided to First Class Super either by email or mail

First Class Super
PO Box 7525
Beaumaris VIC 3193
info@firstclasssuper.com.au
03 8609 0199

Fees

New Fund Establishment - **\$440** (incl GST)

New Fund Establishment with Sole Purpose Company Establishment - **\$1,223** (incl ASIC fee & GST)

Payment Details

Payment is required prior to the SMSF being established. Payment can be made by either mailing a cheque to First Class Super or by direct credit:

Account name: First Class Super Pty Ltd
BSB: 182-512 Account No: 963022678

1. Fund Information

What is the name of the Fund	<input type="text"/>
Commencement Date	<input type="text"/>
Name of Person Establishing the Fund	<input type="text"/>
What is this Person's Street Address	<input type="text"/>
Suburb or City	<input type="text"/>
State	<input type="text"/>
Postcode	<input type="text"/>
Email	<input type="text"/>
Phone Number	<input type="text"/>

2. Member Information

How many members will the Fund have when it starts?

Member 1

Family Name

Given Names

Date of Birth

Place of Birth

Occupation

Street Address

Suburb or City

State

Postcode

Tax File Number

Member 2

Family Name

Given Names

Date of Birth

Place of Birth

Occupation

Street Address

Suburb or City

State

Postcode

Tax File Number

Member 3

Family Name	<input type="text"/>
Given Names	<input type="text"/>
Date of Birth	<input type="text"/>
Place of Birth	<input type="text"/>
Occupation	<input type="text"/>
Street Address	<input type="text"/>
Suburb or City	<input type="text"/>
State	<input type="text"/>
Postcode	<input type="text"/>
Tax File Number	<input type="text"/>

Member 4

Family Name	<input type="text"/>
Given Names	<input type="text"/>
Date of Birth	<input type="text"/>
Place of Birth	<input type="text"/>
Occupation	<input type="text"/>
Street Address	<input type="text"/>
Suburb or City	<input type="text"/>
State	<input type="text"/>
Postcode	<input type="text"/>
Tax File Number	<input type="text"/>

3. Trustee Information

Will the trustee be a company? Yes - If existing company go to Section 4. If new company go to Section 5
 No - Go to Section 6

4. Existing Trustee Company Details

Full Company Name

ACN

Go to Section 6

5. New Trustee Company Details

Company Name

PTY LTD

Alternate Company Name

PTY LTD

Registered Office Address

Suburb or City

State

Postcode

Does the company occupy these premises?

Yes

No - But the person or organisation at these premises has agreed to be the registered office for this company

Is the company's principal place of business the same as the company's registered office?

Yes

No - Provide Principal Business address below

Principal Business Address

Suburb or City

State

Postcode

Go to Section 6

6. Single Member Fund

Is the Fund a single member fund?

- No - All member's listed at Section 2 will be trustees. Go to Section 7
- Yes - Sole Director of Trustee Company. Go to Section 7
- Yes - Provide second Trustee/Director below

Family Name

Given Names

Date of Birth

Place of Birth

Street Address

Suburb or City

State

Postcode

Tax File Number

Go to Section 7

7. Primary Contact Details

The details listed below will be used by First Class Super in all dealings with regards to this SMSF

Type of Contact

- Trustee
- Accountant
- Adviser
- Other

Family Name

Given Names

Company Name

Street Address

Suburb or City

State

Postcode

Telephone

Fax

Mobile

Postal Address Same as Street Address - Go to Section 8
 Different to Street Address - Provide below

Postal Address

Suburb or City

State

Postcode

8. Declaration

Print Name

Signature

Date