

Self-Managed Super Fund (SMSF) Formation Form

St George Tax Care Pty Ltd (SGTCPL)

CPA | Registered Tax Agent | SMSF & Property Finance Specialists

1. Trustee Structure

Type of Trustee:

☐ Individual Trustees

☐ Corporate Trustee

2. Member/Trustee Details

Repeat for up to 6 members

Full Name: _____

Date of Birth: ____ / ____ / ____

Gender: ☐ Male ☐ Female ☐ Other

Residential Address: _____

Suburb: _____ State: ____ Postcode: _____

Tax File Number (TFN): _____

Contact Number: _____

Email: _____

Existing Super Fund (if rollover planned): _____

Estimated Balance: \$ _____

3. Corporate Trustee Details (if applicable)

Company Name: _____

ACN: _____

Registered Office Address: _____

Directors (names & DOB): _____

4. Fund Details

Proposed SMSF Name: _____

Date SMSF to Commence: ____ / ____ / ____

Initial Contributions (per member): _____

Will the fund purchase property (residential/commercial)? ☐ Yes ☐ No

Will the fund consider Limited Recourse Borrowing Arrangement (LRBA)? ☐ Yes ☐ No

5. Bank Account Setup

Preferred Bank (if known): _____

Account Name: _____

6. Adviser & Accountant Authority

I/we authorise St George Tax Care Pty Ltd (Tax Agent No. [insert]) to:

- Establish the SMSF and prepare governing documents (trust deed, minutes, ATO forms).
- Apply for ABN and TFN for the SMSF.
- Register the SMSF with the ATO for tax purposes.

7. Declaration

I/we declare the information provided is true and correct.

I/we understand the responsibilities of being an SMSF trustee, including compliance with the Superannuation Industry (Supervision) Act 1993.

Signatures of Members/Trustees:

1. _____ Date: ____ / ____ / ____
2. _____ Date: ____ / ____ / ____
3. _____ Date: ____ / ____ / ____
4. _____ Date: ____ / ____ / ____

Important Notice:

This form collects information to establish an SMSF. Trustees are responsible for ongoing compliance, record-keeping, and annual reporting to the ATO. St George Tax Care Pty Ltd can assist with setup, accounting, audit coordination, and compliance obligations.