

Section 1 – Fund Details

Name of Fund	
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Section 2 – LRBA Company Details

New Company: (Complete Section 4 & remaining form sections)

Existing Company:

Section 3 – Existing Company Details (Provide a current annual company statement)

Company Name					
ACN					
Address					
Suburb		State		Post Code	

Section 4 – New Company Details

Preferred Name for Trustee Company: _____

Alternative Name for Trustee Company: _____

Company names must be unique and not similar to any other Company. Please check your preference on the ASIC website or click on this link - [ASIC Company Register](#)

Section 5 – Director Details

Director 1

Title: Mr Mrs Ms Other _____

Gender: Male Female Other

First Names		Surname			
Address					
Suburb		State		Post Code	

Date of Birth		Town / City / Country of Birth			
Former Name/s					
Tax File Number		Director ID Number <small>(only required if Fund has a Corporate Trustee)</small>			
Phone number		Occupation			
Email Address					

Director Consent

I am aware of my responsibilities and consent to my appointment as a director of the LRBA Company.

Which of the following declarations are you as a director of the trustee able to make:

- I am unaware, or have no reasonable grounds to suspect, that a person who is, or is acting as, a responsible officer of the trustee is a disqualified person as defined in section 120(1) of the Superannuation Industry (Supervision) Act 1993.
- I am aware, or have reasonable grounds to suspect, that a disqualified person is, or is acting as, a responsible officer of the Trustee. However, we believe that person is eligible (under subsection 126B(1) of the Superannuation Industry (Supervision) Act 1993) to apply to the regulator for a declaration waiving his or her status as a disqualified person and that the person will make an application under subsections 126B(1) within the allowed period.

Signature: _____

Date: ____/____/____

Section 5 – Director Details

Director 2

Title: Mr Mrs Ms Other _____

Gender: Male Female Other

First Names		Surname			
Address					
Suburb					

Date of Birth		Town / City / Country of Birth			
Former Names					
Tax File Number		Director ID Number <small>(only required if Fund has a Corporate Trustee)</small>			
Phone number		Occupation	Accountant		
Email Address					

Director Consent

I am aware of my responsibilities and consent to my appointment as a director of the LRBA Company.

Which of the following declarations are you as a director of the trustee able to make:

- I am unaware, or have no reasonable grounds to suspect, that a person who is, or is acting as, a responsible officer of the trustee is a disqualified person as defined in section 120(1) of the Superannuation Industry (Supervision) Act 1993.
- I am aware, or have reasonable grounds to suspect, that a disqualified person is, or is acting as, a responsible officer of the Trustee. However, we believe that person is eligible (under subsection 126B(1) of the Superannuation Industry (Supervision) Act 1993) to apply to the regulator for a declaration waiving his or her status as a disqualified person and that the person will make an application under subsections 126B(1) within the allowed period.

Signature: _____

Date: ____/____/____

Section 5 – Director Details

Director 3

Title: Mr Mrs Ms Other _____

Gender: Male Female Other

First Names		Surname			
Address					
Suburb		State		Post Code	

Date of Birth		Town / City / Country of Birth			
Former Names					
Tax File Number		Director ID Number <small>(only required if Fund has a Corporate Trustee)</small>			
Phone number		Occupation			
Email Address					

Director Consent

I am aware of my responsibilities and consent to my appointment as a director of the LRBA Company.

Which of the following declarations are you as a director of the trustee able to make:

- I am unaware, or have no reasonable grounds to suspect, that a person who is, or is acting as, a responsible officer of the trustee is a disqualified person as defined in section 120(1) of the Superannuation Industry (Supervision) Act 1993.
- I am aware, or have reasonable grounds to suspect, that a disqualified person is, or is acting as, a responsible officer of the Trustee. However, we believe that person is eligible (under subsection 126B(1) of the Superannuation Industry (Supervision) Act 1993) to apply to the regulator for a declaration waiving his or her status as a disqualified person and that the person will make an application under subsections 126B(1) within the allowed period.

Signature: _____

Date: ____/____/____

Section 5 – Director Details

Director 4

Title: Mr Mrs Ms Other _____

Gender: Male Female Other

First Names		Surname			
Address					
Suburb		State		Post Code	

Date of Birth		Town / City / Country of Birth			
Former Names					
Tax File Number		Director ID Number <small>(only required if Fund has a Corporate Trustee)</small>			
Phone number		Occupation			
Email Address					

Director Consent

I am aware of my responsibilities and consent to my appointment as a director of the LRBA Company.

Which of the following declarations are you as a director of the trustee able to make:

- I am unaware, or have no reasonable grounds to suspect, that a person who is, or is acting as, a responsible officer of the trustee is a disqualified person as defined in section 120(1) of the Superannuation Industry (Supervision) Act 1993.
- I am aware, or have reasonable grounds to suspect, that a disqualified person is, or is acting as, a responsible officer of the Trustee. However, we believe that person is eligible (under subsection 126B(1) of the Superannuation Industry (Supervision) Act 1993) to apply to the regulator for a declaration waiving his or her status as a disqualified person and that the person will make an application under subsections 126B(1) within the allowed period.

Signature: _____

Date: ____/____/____

Section 6 – Custody Trust Details

Name of Custody Trust	
Which Jurisdiction's laws will apply to the Declaration of the Custody Trust? Please enter the state in which the custody trust laws will apply	

Lender Details

Name of Custody Trust	
Which Jurisdiction's laws will apply to the Declaration of the Custody Trust? Please enter the state in which the custody trust laws will apply	

Lender's Company Name					
Lender's Company ACN?					
Address					
Suburb		State		Post Code	

Loan Details

Loan Amount	\$
Loan Term	
Settlement Date	

Asset Details

What type of asset is the trustee acquiring for the fund through the limited recourse borrowing arrangement?

- Real estate.
- Shares in a company listed on the ASX.
- Shares in a company not listed on the ASX.
- Units in a trust, fund or managed investment, registered with ASIC, and listed on the ASX.
- Units in a trust, fund or managed investment, registered with ASIC, but not listed on the ASX.
- Other

Property Details

Address					
Suburb		State		Post Code	
Title Reference Number					

Section 7 – Declaration

By signing the below declaration i/we as trustees/members of the fund:

- Declare that the information I/we have provided in this application is true, correct, and complete.
- Request that Australian Super Manager provide the necessary documentation/information to establish the SMSF Limited Recourse borrowing arrangement on behalf of the fund trustees and will pay the current scheduled fee from the SMSF bank account by current payment method (direct Debit).
- Understand that Australian Super Manager may collect, use, and disclose the information in this form to third parties during the setup of the fund and ongoing administration of the fund.
- Authorise for Australian Super Manager to apply for an ACN for the trustee company (if applicable).
- Declare that Australian Super Manager has not provided any advice in relation to the setup or ongoing investments of the LRBA.

Name		Signature	
Name		Signature	
Name		Signature	
Name		Signature	