



Phone: 1300 66 86 09

Fax: 1300 66 87 09

SMSF GEARED INVESTMENT DEED ORDER FORM

Name: _____

Firm: _____

Phone: _____

Email: _____

SMSF INVESTOR DETAILS (Self Managed Superannuation Fund)

Please submit a copy of the original fund deed (and any documents that have amended it) together with this order form

SMSF Name _____

SMSF Trustee Name _____

If Corporate Trustee - 1. ACN _____

2. Names of ALL Directors (1st 2 listed to be signatories) _____

SMSF Address _____

Names of ALL SMSF Members (Fund Members) _____

BARE TRUST DETAILS

Bare Trust Name _____

Bare Trustee Name _____

If Corporate Trustee -1. ACN _____

2. Names of ALL Directors (1st 2 listed to be signatories) _____

Bare Trustee Address _____

INVESTMENT DETAILS

ASSET DESCRIPTION - Please provide a full description of the asset being acquired as the investment including real property description in the case of land.

FULL NAME OF LENDER (EG. ANZ BANK): _____

PAYMENT DETAILS: Please debit the following credit card in the amount below (see over for charges).

TYPE OF CARD: Visa MasterCard Diners Club Amex Bankcard

CARD NUMBER: _____ EXPIRY DATE: (/) AMOUNT: \$ _____

NAME ON CARD: _____ SIGNATURE: _____

Please return this Form on QUICK-FAX 1300 668 709 or call with any queries

PLEASE COMPLETE THE FOLLOWING ONLY IF THE BORROWING IS SELF FUNDED – DO NOT COMPLETE IF FUNDING SOURCE IS A BANK OR LENDING INSTITUTION.

These details are only required if loans are to be obtained from persons or companies who do not have standard loan documentation. For example where a party related to the SMSF makes a loan for the asset acquisition.

GUARANTOR DETAILS

Guarantor Name _____

If Company -1. ACN _____

2. Names of ALL Directors
(1st listed to be Chairman) _____
(1st 2 listed to be signatories) _____

Guarantor Address _____

IMPORTANT NOTE – the ATO has expressed some concern regarding circumstances where a personal guarantee for the borrowing is given by a third party, particularly where the guarantee is given by a member or a related party of the SMSF. Such a personal guarantee may result in recourse being made to the assets of the SMSF other than the asset acquired in the event that the guarantee is enforced against the trustee as the principal debtor, contrary to the intent that the exception in subsection 67(4A) of the SIS Act only applies to limited recourse borrowings.

LOAN AGREEMENT DETAILS

Lender Name _____

If Company -1. ACN _____

2. Names of ALL Directors
(1st listed to be Chairman) _____
(1st 2 listed to be signatories) _____

Lender Address _____

Loan Amount \$ _____

Term _____

If a loan constitutes a Div 7A loan then the applicable term will be the lesser of the maximum period available under Div 7A and the terms stipulated by you.

Interest Rate _____

If the loan constitutes a Div 7A loan then the applicable interest rate will be the higher of the rate stipulated by you and the rate applicable from time to time under Div 7A. the interest rate may be linked to actual funding costs rather than a set rate and may be fixed or variable.

Loan Security (please provide a FULL description of the security to be given securing the loan including a description of the property or assets)

IMPORTANT NOTE: Quick Companies does not provide advice in relation to superannuation matters, superannuation borrowings, instalment warrants or any stamp duty or other state or territory taxes nor in respect of any other matter. Please note that superannuation laws and practice, taxation laws and practice, trust laws and stamp duty laws are continually changing. Professional advice should be obtained before signing any documents. Significant fees, duties and penalties can be imposed when entering into arrangements of this type. You must satisfy yourself that the documents comply with the relevant legislation and the law regarding arrangements of this type particularly the Superannuation Industry (Supervision) Act 1993 and Regulations. Accordingly, except to the extent required by law, we do not accept any responsibility other than in relation to the provision of the documents in accordance with your instructions.



Phone: 1300 66 86 09

SMSF GEARED INVESTMENT STRUCTURE

Under the Quick Companies standard documentation, the SMSF borrows directly from the nominated lender and invests the borrowed funds and any additional amount to be contributed by the SMSF in the asset which is held by a custodian trustee.

If you require a non standard structure, please contact us to discuss prior to ordering.

DO YOU REQUIRE:

- Bare Trust Deed

- New company for corporate custodian trustee (recommended)
Please attach a completed Company Registration Order Form

- SMSF Trust Deed Upgrade (recommended)
Please attach a completed Superannuation Deed Upgrade Order Form

- New SMSF Trust Deed
Please attach a completed SMSF Trust Deed Order Form

COMPLETE BELOW ONLY IF SELF FUNDED AND YOU HAVE COMPLETED PAGE 2

- Loan Agreement
Please complete the Loan Agreement details

- Guarantee and Indemnity
Please complete the Guarantor details

- Mortgage
Please complete the Loan Security details

QUICK COMPANIES SMSF GEARED INVESTMENT DEED – STANDARD FEES AND CHARGES

SMSF BARE TRUST WITH LOAN AGREEMENT	\$1540.00 GST inc.
SMSF BARE TRUST ONLY	\$770.00 GST inc.

These fees exclude new corporate custodian trustee, new SMSF trust deed, super deed upgrade or security documents where required. Please contact Rod Neibling of Quick Companies for a quote prior to ordering.

IMPORTANT NOTE: *The above fees and charges do not include additional out of pocket expenses required for the completion of the transaction documents. For example, stamp duties and registration fees will be payable in all jurisdictions in relation to any loan or security documentation and are not included in these fees.*