



## Self-managed superannuation fund set up check list

### 自营养老金成立资料清单

Item	Questions	Details
1	Name of SMSF 名稱	
2	SMSF establish date 成立日期	
3	The name & address of the establisher 建立者的名稱及地址	
4	If establisher is a employer of any member of SMSF, 假如建立者為養老金任何一位成員的僱主	
	➤ ACN and ABN 僱主的 ACN & ABN	
	➤ Whether this company will execute trust deed by common seal or by authorized representative? 是否該公司將通過印章或授權方實施 trust deed	
5	Number of members 成員個數	
6	The jurisdiction laws applying to the trust deed 適用那個州的法律	
7	If SMSF only has one member, give his details, including Name, DOB, address of the other trustee (or other Director of the trustee corporation) 假如養老金只有一個成員，需要姓名，出生年月，其他 trustee 的地址或 corporate trustee 的其他董事資料	
<b>For each member 每一位成員具體資料</b>		
1	Name 姓名	
2	Occupation 職業	
3	Birth details 出生日期	
4	Address 住址	
5	Tax file number 稅號	
6	Beneficiaries names and relationships 受益人姓名及關係	



7	Proportion of benefit each beneficiaries receive 每位受益人受益比例	
8	Whether the death benefit is bind to the trustee 是否 trustee 涉及死亡利益	
<b>Trustee as a company 公司作為 trustee</b>		
1	Name 公司名稱	
2	ACN & ABN	
3	Address 公司地址	
	➤ Number of directors of company 公司董事個數	
	➤ Whether this company will execute trust deed by common seal or by authorized representative? 是否該公司將通過印章或授權方實施 trust deed	
4	Details of trustee meeting to establish SMSF 建立養老金會議	
	➤ Who will chair that meeting 誰組織會議	
	➤ The venue, date and time for that meeting 時間、地點	
5	Details of meeting to establish SMSF'S investment strategy 建立養老金投資策略	
	➤ Who will chair that meeting 誰組織會議	
	➤ The venue, date and time for that meeting 時間、地點	
6	The name of the organization that will be the SMSF's accountant 會計師名稱	
7	The name of the organization that will audit the SMSF 審計師名稱	



## Conditions and declaration

1. Each of trustees (or directors of the trustee company) does not employ any of the other trustees (or directors of the trustee company), unless they are related.
2. If trustee is a company, director of trustee must make one of following declaration:
  - a. "We are / 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. "
  - b. "We are / 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 / I believe that person is eligible \*(under subsection 126B(1) of the Superannuation Industry (Supervision) Act 1993) to apply to the Regulation for a declaration waiving his or her status as disqualified person and that the person will make an application under subsection 126B(3) within the allowed period. "

**I declare that the applicant is entitled to registration and that the information given on this application is true and correct.**

Name and signature

Position Held (For example Director, Partner, Trustee, Tax Agent, Public Officer):

Date of Declaration: