

Credit Card Details

☐ Visa ☐ Master Card ☐ American Express *

* American Express cards will attract a 1.75% surcharge

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CUSTODIAN DEED ORDER FORM

The entering into a Custodian Deed where the self managed super fund rules do not allow for it could be a breach of the duties of the trustee or a breach of the SIS Act resulting in undesirable consequences. Accordingly the trustee must satisfy itself of the following:

The rules permit the fund

- 1. to borrow**
- 2. acquire an investment property**
- 3. permit the legal ownership of the property to vest in an individual or corporate nominee or custodian.**

In addition the trustee must ensure that the purchase of the asset, the subject of the Custodian Deed is in accordance with the fund's investment strategy.

We will require the following documents to properly prepare the Custodian Deed:

- Current company extract of the corporate trustee (if applicable)
- Current company extract of the corporate custodian (if applicable)

Name of Self-Managed Super Fund: _____

Proposed name of bare trust created by this Deed (Optional): _____
(See Note 1 at end of form)

IF CURRENT TRUSTEE IS A COMPANY - COMPLETE

Name of Trustee Company _____

ACN of Trustee Company _____

Address of Trustee Company _____

Name of all Directors/Secretaries of the Trustee Company (or if not available a current extract):

Director

Director

Director

Secretary

Chairman of Directors of the Trustee Company _____

IF CURRENT TRUSTEE(S) ARE NATURAL PERSONS – COMPLETE

PLEASE NOTE THAT MANY LENDERS ARE NOW REQUIRING THAT THE TRUSTEE OF THE FUND BE A CORPORATE TRUSTEE. WE RECOMMEND THAT YOUR CLIENT CHECK THIS REQUIREMENT WITH THEIR LENDER BEFORE PROCEEDING

Name of 1st Trustee _____

Address of 1st Trustee _____

Name of 2nd Trustee _____

Address of 2nd Trustee _____

IF CUSTODIAN IS A COMPANY - COMPLETE

Name of Custodian Company _____

ACN of Custodian Company _____

Address of Custodian Company _____

Name of all Directors/Secretaries of the Custodian Company:

Director

Director

Director

Secretary

Chairman of Directors of the Custodian Company _____

IF CUSTODIAN IS A NATURAL PERSON(S) – COMPLETE

PLEASE NOTE THAT MANY LENDERS ARE NOW REQUIRING THAT THE CUSTODIAN OF THE PROPERTY BE A CORPORATE CUSTODIAN. WE RECOMMEND THAT YOUR CLIENT CHECK THIS REQUIREMENT WITH THEIR LENDER BEFORE PROCEEDING

Name of 1st Custodian _____

Address of 1st Custodian _____

Name of 2nd Custodian _____

Address of 2nd Custodian _____

MEMBERS OF FUND

Name of Member _____

Address of Member _____

Name of Member _____

Address of Member _____

DETAILS OF ASSET

Type of Asset: _____
[eg residential, retail, commercial property, shares, units in a unit trust]

Legal Description: _____

[eg If property, the address and title particulars]

NOTE 1

Some banks are now requiring a name for custodian deeds. If you do not provide a name we will insert N/A alongside the appropriate Item No. We suggest a name based on the Fund Name and Property Address. For instance if the Smith Superannuation Fund was buying a property in Jones Street, Moonsville then you could use the name Smith Jones Street Moonsville Custodian Trust.

DISCLAIMER

PLEASE NOTE LEGAL, ACCOUNTING AND FINANCIAL ADVICE MUST BE OBTAINED PRIOR TO ENTERING INTO THE CUSTODIAN DEED.

We do not provide legal, accounting or stamp duty advice and therefore take no responsibility for your taxation, legal or other liabilities which may arise from the work we perform on your instructions. We urge you to first obtain legal, accounting and financial advice in relation to your affairs and in particular this transaction.

Your Details:

By completing this form you agree to the trading terms and conditions of Corporate Express found on www.corporateexpress.com.au and acknowledge that Corporate Express will act as the lodging agent for any ASIC forms relating to this order.

Name _____

Contact _____ Email _____

Address _____

Delivery Address _____

Phone _____ Fax _____