



416 Flinders Mall (PO Box 991)  
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## SMSF BORROWING DOCUMENTATION *Please complete all details in block letters.*

### SECTION A: PERSON ORDERING

Name: \_\_\_\_\_ Signature \_\_\_\_\_

Documents and invoice will be sent to this person unless otherwise instructed. Tick here  for invoice to be made out to fund's trustee.

Firm name (if applicable) \_\_\_\_\_

Street address \_\_\_\_\_

Postal address (if different) \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

### SECTION B: ASSET

The fund will acquire: real property  listed shares  unlisted shares  other

Description of asset: if real property, please supply the address and Certificate of Title information (eg, volume & folio reference). If shares, specify number, class, price per share and company name and ACN. If other, provide details below:

\_\_\_\_\_  
\_\_\_\_\_

Total purchase price: \$ \_\_\_\_\_

Amount contributed by borrower: \$ \_\_\_\_\_ Amount lent by lender: \$ \_\_\_\_\_

### SECTION C: DETAILS OF THE SMSF (BORROWER)

Name of fund: \_\_\_\_\_

### SECTION D: SMSF TRUSTEE DETAILS (complete section D(I) if a company or D(II) if individuals)

#### SECTION D(I) : COMPANY TRUSTEE (IF APPLICABLE)

Name: \_\_\_\_\_ ACN \_\_\_\_\_ - \_\_\_\_\_

Address of registered office: \_\_\_\_\_

Full names of all directors of trustee company

T1		T2	
T3		T4	

**SECTION D(ii): INDIVIDUAL TRUSTEES (IF APPLICABLE)**

<b>T 1</b>	Full Name	
	Street Address	

<b>T 2</b>	Full Name	
	Street Address	

<b>T 3</b>	Full Name	
	Street Address	

<b>T 4</b>	Full Name	
	Street Address	

**SECTION E: DETAILS OF LENDER**

Lender is a: trustee of a trust (eg, family trust)  
 a company or F(II) if individuals  
                   company  
                   SMSF member(s)  
                   other natural person(s)

complete F(I) if trustee is

- complete F(I)
- complete F(II)
- complete F(II)

**SECTION F(i) : COMPANY DETAILS(IF APPLICABLE)**

Name: \_\_\_\_\_ ACN \_\_\_\_\_ - -

Address of registered office \_\_\_\_\_

Full names of all directors of company:

<b>T1</b>		<b>T2</b>	
<b>T3</b>		<b>T4</b>	

If this company is acting as trustee of a trust, name trust: \_\_\_\_\_

**SECTION F(ii): INDIVIDUAL(S) (IF APPLICABLE)**

<b>T 1</b>	Full Name	
	Street Address	

<b>T 2</b>	Full Name	
	Street Address	

**SECTION G: SECURITY TRUSTEE DETAILS** (this entity will hold the asset on trust for the SMSF)

**COMPANY DETAILS**

Name: \_\_\_\_\_ ACN \_\_\_\_\_ - \_\_\_\_\_

Address of registered office \_\_\_\_\_

Full names of all directors of company:

<b>T1</b>		<b>T2</b>	
<b>T3</b>		<b>T4</b>	

**SECTION H: LOAN TERMS**

Type of loan: principal and interest  interest only

Interest rate: \_\_\_\_\_ per annum Default interest rate: \_\_\_\_\_ (eg, + 2%) Term: \_\_\_\_\_ (eg, 7 years)

Repayments monthly  quarterly  annually   
other: \_\_\_\_\_

Interest rate is: fixed  variable

Other instruction about loan terms:

\_\_\_\_\_  
\_\_\_\_\_

**SECTION I: DOCUMENTS SUPPLIED TO CONNOLLY SUTHERS**

I have included a copy of the SMSF's current trust deed for review

Has any relevant contract to purchase real estate been completed? Yes  No

( I have included a copy of the sale contract  )

Any other relevant documents I have supplied: \_\_\_\_\_

**SECTION J: ADDITIONAL INSTRUCTIONS:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

By submitting this order form, you acknowledge that:

1. This request is for the preparation of documents only. Unless specifically requested and agreed to, Connolly Suthers has not provided any advice in relation to the proposed transaction.
2. All parties to the transaction should obtain independent advice before implementing the proposed transaction as these borrowings can give rise to numerous legal, superannuation, duty and taxation issues. Depending on the type of asset being acquired, parties should also seek stamp duty advice as well as conveyancing advice.
3. The documents requested will be prepared based on the law as at the date of receipt of this order form. The laws permitting borrowings by regulated superannuation funds are relatively new and may be subject to change. Expert advice should be obtained if there is any doubt or if the documents are not implemented shortly after receipt.
4. As a law firm Connolly Suthers is not licensed to provide financial product advice under the *Corporations Act 2001* (Cth).