

# Self Managed Super Fund Order Form 2024

Read [FAQs page 9 here](#) and take action as needed. Attach a [CORRECTLY certified \(see pg 8 FAQs\)](#) copy of a primary ID for each Member showing FULL NAMES.

Complete for and email to [SMSForder@freedomffs.com.au](mailto:SMSForder@freedomffs.com.au)

## SMSF Name

No of Members	_____	Trustee type	Company OR Individual
Approximate initial \$ rollover amount*	_____	We recommend the Company as it is more cost effective over time. If you only have one member you MUST select Company. All Company Trustee Members must have a Director's ID number.	

## Member 1

Every member must provide all the information below. **Member 1 will be the primary contact** for this SMSF order and will be appointed the Chairperson/Secretary as well as Director for Company Trustee orders. **Copy & complete pages 1 & 3 as needed for members 3-6**

Title	_____	First name	_____
Middle name	_____	Last name	_____
Date of birth	_____	Place of birth	_____ (town & State)
Phone	_____	Email	_____
Residential address	_____		
Suburb	_____		
State	_____	Post code	_____
Tax file No.	_____	Director ID No.	_____
Occupation	_____ (and industry)		

## Existing super to be rolled over

Fund name	_____	Number	_____
Fund name	_____	Number	_____
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>	Have you been convicted of an offence in respect of dishonest conduct?	
<input type="checkbox"/>	<input type="checkbox"/>	Are you an undischarged bankrupt?	
<input type="checkbox"/>	<input type="checkbox"/>	Are your business and individual tax up to date?	
<input type="checkbox"/>	<input type="checkbox"/>	Do you have tax debt?	
<input type="checkbox"/>	<input type="checkbox"/>	Have you previously had an SMSF?	
<input type="checkbox"/>	<input type="checkbox"/>	Have you been known officially by any other name? If so, email us that information and documentation	

## Member 2

Title	_____	First name	_____
Middle name	_____	Last name	_____
Date of birth	_____	Place of birth	_____ (town & State)
Phone	_____	Email	_____
Residential address	_____		
Suburb	_____		
State	_____	Post code	_____
Tax File No.	_____	Director ID No.	_____
Occupation	_____ (and industry)		

## Existing super to be rolled over

Fund name	_____	Number	_____
Fund name	_____	Number	_____
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>	Have you been convicted of an offence in respect of dishonest conduct?	
<input type="checkbox"/>	<input type="checkbox"/>	Are you an undischarged bankrupt?	
<input type="checkbox"/>	<input type="checkbox"/>	Are your business and individual tax up to date?	
<input type="checkbox"/>	<input type="checkbox"/>	Do you have tax debt?	
<input type="checkbox"/>	<input type="checkbox"/>	Have you previously had an SMSF?	
<input type="checkbox"/>	<input type="checkbox"/>	Have you been known officially by any other name? If so, email us that information and documentation	

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## Director Identification Number

*If you select 'company trustee,' you must apply for and receive a Director Identification Number before we can proceed with the order and appoint as a Director of the Company Trustee of your SMSF.* Start by searching 'how to apply for Director's ID to find out more. You can apply for your DIN either via MYGOVID, over the phone with the ATO on 13 62 50, or with a hardcopy application sent to the ATO (you will need to call them to get the form). A paper application can take weeks, sometimes months. Using MYGOV or calling the ATO at 7:59 am (so you're first in the queue) on 13 62 50 is by far the quickest. Search for 'apply for your director ID' to make sure you have all the information you need before applying.

## SMSF Fees

**\*Initial rollover \$** – *if you expect the total, combined initial value of your SMSF will be less than \$150,000*, when you sign this order form you are confirming that you understand and accept the ongoing administration requirements set out below.

**The cost of to set up an SMSF is \$2500 plus GST.** This fee includes the SMSF Trust Deed and Trustee establishment paperwork, ABN and TFN registration, bank account set up, assisting with the Australian Taxation Office (ATO) and liaising with your outgoing funds for **two** rollover(s). This fee is also applicable to 'partial' set ups, including in cases where you have already created your SMSF Trust Deed and Trustee establishment paperwork.

Rollovers in addition to the two included in the setup fee will be charged at \$200 plus GST per rollover. Adding a member *after SMSF establishment* is \$660 per member, payable in full in advance. To get started, **deposit \$660 into the account below.** You can later reimburse yourself for this deposit from your SMSF once it has been set up.

**Westpac BSB 032-733 Account number 338443**  
**Account name FreedomFFS Pty Ltd**

**By placing your order, you are agreeing to pay the minimum \$2500 plus GST fee, even if you later choose not to finalise your order. We reserve the right to suspend or terminate services when payments are outstanding and if you fail to settle outstanding amounts late payment fee and/or debt collection commissions may apply.**

[The detailed schedule of fees is available here](#); it is important to be aware of the following annual fees. **Annually SMSFs must prepare and lodge an audited tax return; associated fees include:**

1. Payable to FFSS > an SMSF administration service fee, costing approximately 1 per cent of the funds under administration, with a minimum of \$1,620 plus GST for smaller funds, and an upper cap of \$3,120 plus GST ([details here](#))
2. Payable to the ATO > a fee called the supervisory levy of \$259.00
4. Payable to the Auditor > an annual audit fee of \$450-\$700 plus GST
5. Payable to ASIC > a fee of \$65 (GST not payable)
6. Payable to the Actuary > an actuarial fee of \$220 may be payable if one member is in pension mode.

**Member(s) initial here**

**OPTIONAL Registered ASIC Agent – Payable to FFSS > a fee of \$300 plus GST –** When you TICK YES below to engage us as your Registered ASIC Agent, we will:

- Organise the Minutes for your SMSF Company Directors to pass a solvency resolution (whether solvent or insolvent); this must be done every year when you pay your annual ASIC fee.
- Review the Company Statement to ensure consistency with company secretarial documents and those maintained by ASIC.
- Forward the completed Annual Review to the SMSF Company, together with the ASIC annual fee invoice and the Solvency Resolution for signature by the Directors.
- Lodge signed and completed documents with ASIC for any of the following changes, as and when you should require them, including change of address, appoint or cease company officeholder, change of name (officeholders or members), change to members' register, change to share structure, change of details (ultimate holding company), change to special purpose company status
- Send out a courtesy reminder to your SMSF Company to pay the ASIC invoice by the due date to avoid penalties.
- Send out the ASIC Annual Review by email and by post.
- Ensure timely renewals when you change address as we always receive the Company Statements on your behalf.
- Act as your Registered Office to keep your privacy confidential.

## FREEDOMFFS Pty Ltd

I/we agree that I have been provided with information only and have chosen to set up an SMSF without financial advice. I/we agree that I/we will comply with ATO regulations and educate ourselves to operate an SMSF in accordance with the ATO Trustee Declaration.

### Client Directed Authority – No Advice

The Accountant  
FreedomFFS Pty Ltd  
Unit 5, 44 Hoskins Street, Mitchell ACT 2911  
PO Box 192, Dickson ACT 2602

I/we hereby direct FreedomFFS Pty Ltd to arrange the establishment of a Self-Managed Superannuation (SMSF) on my/our behalf. In making this direction I/we acknowledge that:

- Representatives of FreedomFFS Pty Ltd may have given me a factual explanation as to how an SMSF operates, the rules and regulations and the costs but they did not give any advice as to whether I should set up an SMSF or not.
- FreedomFFS Pty Ltd nor any of its Representatives shall be responsible in any manner for any loss or damage suffered or arising from the potential unsuitability of the SMSF for my/our needs.
- I/we understand that by directing rollovers and/or transfers of superannuation capital from accounts with corporate, retail and/or industry superannuation funds to an SMSF, I/we risk the continuity of personal insurances.
- I/we have read and understand the [process and timeframe to set up my SMSF as set out here](#).
- I/we confirm I/we understand and accept the ongoing administration requirements and agree to pay the fees as set out in the [schedule of fees](#) set out in this order form [and online here](#).

I confirm that the direction to establish an SMSF has been initiated by I/we the client and that FreedomFFS Pty Ltd has not given me/us any financial planning advice, and that FreedomFFS Pty Ltd is establishing the SMSF me/us as an Accountant Remuneration Agreement.

I/we would like Freedom Financial Superannuation Solutions Pty Ltd to act as our Registered ASIC Agent **Yes / No**

How did you hear about us? **Please tell us**  \_\_\_\_\_

**Signed by** (sign a piece of paper, take a photo of your signature(s), and upload it/them into the box(es) below.)

Member 1 Name

Member 2 Name

\_\_\_\_\_  
I hereby consent to act as the Chairperson/Secretary and Director of the company trustee (if applicable) upon its registration.

\_\_\_\_\_  
I hereby consent to act as a Director of the company trustee (if applicable) upon its registration.

I/we agree with the information, terms and conditions provided in this form, to comply with ATO regulations, and to educate myself/ourselves about SMSFs in accordance with the ATO Trustee Declaration.

I/we also agree to read pages 1-9 of the [FFS Frequently Asked Questions here](#), and take action as needed.

