

Self Managed Super Fund (SMSF) Order Form August 2026

Complete this form and email to SMSForder@freedomffs.com.au

Read our FAQs (pages 8-9) and take action as needed. Attach a clear colour copy of a primary photo ID for each member, together with a clear colour photograph of the member holding the ID next to their face.

SMSF Name

No of Members	Trustee type**	Company / Individual
Approximate initial \$ rollover amount*	Primary source of funds	

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 and complete pages 1 & 3 as needed for members 3-6**

Title	First name	
Middle name	Last name	
Date of birth	Place of birth	
Phone	Email	
Residential address		
Suburb		
State	Post code	
Tax file No.	CALL 1300 333 121	Director ID No.**
Occupation		

Existing super to be rolled over (If you have more than one fund, send us that info in your email)

Fund name	Number	
Yes	No	
☐	☐	Have you been convicted of an offence in respect of dishonest conduct?
☐	☐	Are you an undischarged bankrupt?
☐	☐	Are your business and individual tax up to date?
☐	☐	Do you have tax debt?
☐	☐	Have you previously had an SMSF?
☐	☐	Have you been known officially by any other name? If so, email us that information and documentation
☐	☐	Are you, or a close family member or associate, a politically exposed person (PEP)?
☐	☐	Are you currently designated under any Australian or international sanctions regime?

Member 2

Title	First name	
Middle name	Last name	
Date of birth	Place of birth	
Phone	Email	
Residential address		
Suburb		
State	Post code	
Tax File No.	CALL 1300 333 121	Director ID No.**
Occupation		

Existing super to be rolled over (If you have more than one fund, send us that info in your email)

Fund name	Number	
Yes	No	
☐	☐	Have you been convicted of an offence in respect of dishonest conduct?
☐	☐	Are you an undischarged bankrupt?
☐	☐	Are your business and individual tax up to date?
☐	☐	Do you have tax debt?
☐	☐	Have you previously had an SMSF?
☐	☐	Have you been known officially by any other name? If so, email us that information and documentation
☐	☐	Are you, or a close family member or associate, a politically exposed person (PEP)?
☐	☐	Are you currently designated under any Australian or international sanctions regime?

smsforder@freedomffs.com.au

If you have more than one Member, will your SMSF investments be (select) ☐ **POOLED** or ☐ **SEGREGATED**?

Proposed investments (select): ☐ superannuation ☐ inheritance ☐ earnings ☐ other (detail in email)

****Director Identification Number**

If you only have one member you MUST select Company. All Company Trustee Members must have a Director's ID number before we can proceed with your order. Apply for your DIN online or over the phone with the ATO on 13 62 50.

SMSF Fees from 1 July 2026 (details here <https://freedomffs.com.au/smsf-setup/>)

***Initial rollover \$** – If your SMSF is expected to have less than \$200,000 on establishment, you acknowledge that you have read the information below and understand the ongoing administration requirements.

Our fee to set up an SMSF is \$2,900 plus GST and (if applicable) the ASIC company trustee fee will be charged separately at cost (\$636). Our setup fee includes the SMSF Trust Deed and Trustee establishment paperwork, ABN and TFN registration, providing the documents and information required for you to apply for an SMSF bank account, assisting with the Australian Taxation Office (ATO) and liaising with your outgoing funds for two rollover(s). This fee also applies to partial establishments, including where you have already created some of the SMSF establishment documents or intend to complete part of the process yourself.

Rollovers in addition to the two included in the setup fee will be charged at \$220 per rollover. Fee to add a Member after SMSF establishment is \$1,650 per member, payable in full in advance. The fee to remove a member is \$1,100, payable in full in advance.

Once your AML/CTF due diligence review has been completed, we will invite you to pay the \$880 deposit into the account below. You may generally reimburse yourself for this deposit from your SMSF after it has been established and received sufficient funds.

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

By paying the deposit and instructing us to commence the SMSF establishment, you agree to pay the \$2900 plus GST setup and (if applicable) ASIC company trustee fees, even if you later choose not to finalise your order. We reserve the right to suspend or terminate services when payments are outstanding. If you fail to settle outstanding amounts, late payment fees and/or debt collection commissions may apply.

Annually SMSFs must prepare and lodge an audited tax return and it is important to be aware of the associated fees, including:

1. Payable to FFSS > an SMSF administration service fee of \$1,990 / \$2,495 / \$3,495 based on the assets held in your SMSF (details 2026 Fee Schedule available)
2. Payable to the Auditor > an annual audit fee of \$575-\$1100
3. Payable to the ATO > an annual fee called the supervisory levy of \$259 (GST not payable – 2026 price, has not increased since 2014)
4. Payable to ASIC > company trustee annual renewal fee of \$70 (GST not payable – 2026 price, usually increases by \$2+ every year)
5. Payable to the Actuary > an actuarial certificate fee of approximately \$220 may apply in certain circumstances.

Member(s) initial here:

6. OPTIONAL — Registered ASIC Agent — payable to FFSS — \$440 per year

If you appoint us as your registered ASIC agent for your SMSF company, we will manage your annual ASIC compliance, including preparing and lodging the Directors' Solvency Resolution, reviewing your ASIC Company Statement, issuing your Annual Review Pack, processing routine company changes on request, sending annual fee reminders, and maintaining your company's Registered Office at our address to ensure ASIC correspondence is managed promptly while protecting your privacy.

Important Notes - The annual fee above is for agent services only. ASIC's annual review fee and any third-party charges are additional. Non-routine or complex changes (eg Member addition/removal, trustee changes, shareholder disputes, legal advice, or constitutional amendments) may attract additional fees, quoted in advance).

Privacy and Data Sharing Notice

Freedom Financial Superannuation Solutions Pty Ltd, Freedom FFS Pty Ltd, Freedom Financial Asset Protection Pty Ltd and Freedom Financial Accounting Solutions Pty Ltd operate as related entities and share administrative systems and client information to deliver integrated professional services. Internal sharing of personal information within our group is necessary to provide our services efficiently and consistently. In accordance with Australian Privacy Principle 6 under the *Privacy Act 1988 (Cth)*, we may use and disclose your personal information within our group for the primary purpose for which it was collected and for related purposes you would reasonably expect. By engaging with any of our entities, you consent to this internal use and disclosure. If you do not wish your information to be shared within our group, please notify us in writing.

smsforder@freedomffs.com.au

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 Instruction and Acknowledgement – No Financial Product Advice

The Accountant
FreedomFFS Pty Ltd
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 [setup process and timeframe as set out https://freedomffs.com.au/smsf-setup/](https://freedomffs.com.au/smsf-setup/).
- 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 on page 2.

I/we confirm that the instruction to establish this SMSF has been initiated by us and that FreedomFFS Pty Ltd has not provided us with financial product advice. We instruct FreedomFFS Pty Ltd to establish the SMSF in accordance with this Order Form.

I/we authorise FreedomFFS Pty Ltd and its related entities to prepare, sign where authorised, lodge and communicate with the Australian Taxation Office (ATO), Australian Securities and Investments Commission (ASIC), Australian Business Register (ABR), financial institutions, superannuation funds, SuperStream providers and other organisations as reasonably necessary to establish our SMSF and carry out the services we have requested.

I/we would like Freedom Financial Superannuation Solutions Pty Ltd to act as our Registered ASIC Agent (select) ☐ 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:

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

Member 2 name:

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

I/we have read the FAQs and completed the actions requested on page 9 here <https://freedomffs.com.au/smsf-setup/> and understand and agree to the information, terms and conditions contained in the FAQs and this Order Form, and agree to comply with ATO regulations, and to educate myself/ourselves about SMSFs in accordance with the ATO Trustee Declaration.

