

Setting up your Self Managed Super Fund (SMSF) in 6 Steps

with



INTRO2SMSF

Before you start the application process, please ensure you have the following information:

1. Your Tax File Number (TFN)
2. A name for your super fund (eg. Mary Jane Super Fund)
3. 3 preferred fund names (this will be your company name for your super fund)

Note: This guide is for Company Trustee applications.

While you can manage your own SMSF, it is highly recommended that you seek professional financial advice from a financial adviser for SMSF investment strategies.

STEP 1: Go to www.xpresssuper.com.au and click 'Get Started'

ability to log on to the innovative reporting system" Rob, Perth "I transfere

1300 216 890

ABOUT XPRESS SUPER XPRESS SUPER SERVICES FACTS AND FORMS FREQUENTLY ASKED QUESTIONS FEES WHY US?

Welcome

- ✓ Free SMSF Establishment*
- ✓ Same day setup
- ✓ First year free*
- ✓ A competitive and comprehensive SMSF service
- ✓ Daily online reporting

* Fees apply to funds operating within our business model. Additional fees may apply if you choose to establish a Company to act as trustee. Excludes statutory government charges.

Xpress Super - Welcome Video

Age Group	Required for cash	Required for other	Required for other	Required for other
Under 65	\$175,500	\$175,500	\$175,500	\$175,500
65-69	\$175,500	\$175,500	\$175,500	\$175,500
70-74	\$175,500	\$175,500	\$175,500	\$175,500
75+	\$175,500	\$175,500	\$175,500	\$175,500

Contact Xpress Super

Email
info@xpresssuper.com.au

Seminars

Keen to find out more about Xpress Super? Email us for details on the next seminar in your capital city

Name

E-mail

OFFLINE - Leave a message

COMMONWEALTH ACCELERATOR CASH ACCOUNT

Before we start, we'd like to know how you heard about us?

- My Adviser
- Internet
- Advertising
- Existing client
- Switzer
- Other

Please select applicable type:

- Establish a new SMSF
- Transfer an existing SMSF

Would you like an Australian Money Market term deposit account?

- Yes
- No

Would you like to find out more about the Maquarie SMA product?

- Yes
- No

Please ensure you have each person's tax file number and your Company Trustee details available before you start filling in this form. It is important that you provide accurate information on this application as any changes made after submission of this form will incur a fee.

Fund details

Name of your Superannuation Fund (Please limit to 30 characters)

 Super Fund

Next

The information contained within this document is of a general nature only. Whilst every care has been taken to ensure the accuracy of the material contained herein at the time of publication neither the author or Licensee will bear responsibility or liability for any action taken by any person, persons or organisation on the purported basis of information contained herein.

Without limiting the generality of the foregoing, no person, persons or organisation should invest monies or take action on reliance of the material contained herein but instead should satisfy themselves independently of the appropriateness of such action.

STEP 2: Fill in the information requested.

In the Fund Details section, the words 'Super Fund' are automatically placed behind your fund name.

Click 'Next' when complete.

Sign Up
Now

Trustee Structure &
Details

Declaration and
Consent

Primary Contact

Please ensure you have each person's tax file number and your Company Trustee details available before you start filling in this form.

Name:

Postal address:

Telephone work:

Telephone home:

Telephone mobile:

Email:

Trustee Structure

Company Trustee

Individual Trustees

Next

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STEP 3: Fill in your contact details.

Select **'Company Trustee'** under Trustee Structure.

Click **'Next'**.

Sign Up
Now

Trustee Structure &
Details

Declaration and
Consent

Please select applicable type:

Please apply for the corporate trustee
on my behalf

Before we can establish a corporate trustee for your SMSF we require you
to go to the ASIC website using the link below to verify the company name
you want is available.

You are able to select a company name that is similar to another but not
identical.

[Click here to go to the ASIC website](#)

Preferred Fund Name 1

Awesome Super Fund

Preferred Fund Name 2

Fantastic Super Fund

Preferred Fund Name 3

Super Super Fund

*Please note our fee for establishing the corporate trustee is \$895 which
will be debited from your super fund bank account once your rollovers have
been processed.

I will establish the corporate trustee
established

I already have a corporate trustee

ASIC Annual Review

- I would like SuperGuardian to handle the ASIC Annual Review for a fee
of \$255 per annum
- I will take care of the ASIC Annual Review myself

Next

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purported basis of information contained herein.

STEP 4: Your Company
information.

Select **‘Please apply for the
corporate trustee on my
behalf’** for Xpress Super to set
up your Company for you.
Enter your 3 preferred fund
names.

Under ASIC Annual Review,
select the preferred option.

It is recommended that you
allow SuperGuardian to handle
the ASIC Annual Review.

Click **‘Next’**.

INTRO2SMSF

Sign Up Now	Trustee Structure & Details	Declaration and Consent
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Company Trustee Structure and Details

Director 1
Title

Mr. ▼

First Name

Test

Last Name

Client

Is This Person a Member?

Yes No

Tax File Number

929929929

Date of Birth DD / MM / YY

01 01 1960

Residential Address

123 Planet St East Victoria Park WA 6101

▶ Address cannot be a PO Box

STEP 5: Enter Company Trustee details.

Ensure that you have your TFN ready.

State & City of Birth

Occupation

Email

Telephone (Work)

Telephone (Home)

Telephone (Mobile)

[Add Another](#)

[Next](#)

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Select **‘Add Another’** if there are more than 1 Directors in your SMSF Company.

Click **‘Next’** when complete.

Sign Up
Now

Trustee Structure &
Details

Declaration and
Consent

Declaration and Consent

I/ We hereby declare that all of the above information is true and correct.

I/ We agree to provide all information required by Xpress Super to ensure the efficiency of ongoing reporting.

In the case of an existing fund, I/we authorise Xpress Super to contact the prior Administrator and/or Accountant to obtain the necessary records and information to enable Xpress Super to undertake the administration of the fund.

I/We agree to bound by the terms and conditions of the direct debit agreement.

I/ We acknowledge we have read and will abide by the term and conditions.

I/We acknowledge and engage Xpress Super's Independent Auditor as outlined in the terms and conditions.

Please note: Submitting an application to have your SMSF established by Xpress Super constitutes engagement of our services. Should you have a change of mind, or decide not to proceed, a fee of \$499 will apply as a change of mind constitutes termination of our agreement.

Submit

STEP 6: Read the Declaration and Consent.

Click **'Submit'**.

Congratulations, you have finished the application for your own SMSF!

NOTE: You will receive an email from Xpress Super within a few days (usually within 24 hours) with a .zip file with documentation which you will have to print, sign and return via email to Xpress Super to complete your application.

As mentioned earlier, it is **highly recommended** that you seek professional advice from a financial planner before starting your own SMSF.

If you have any questions or would like more information, feel free to contact the intro2smsf.com team via the [Contact Us page](#).