

## SMSF LRBA package (SMSF borrowing) order form

Please complete this form and email to Phil Broderick at [pbroderick@sladen.com.au](mailto:pbroderick@sladen.com.au) or call (03) 9611 0163 to chat to Phil directly. You will be sent an invoice for payment after we receive this form.

<b>Contact</b> <i>(enter your contact details here)</i>		
Name		
Firm		
Tel		
<b>Client</b> <i>(enter your client's contact details here)</i>		
Full name		
Address		
Email & Telephone		
<b>Fund Details</b>		
Name of fund		
Date of deed establishment and variation(s)		
<b>Trustee of Fund</b>		
Full name		
ACN		
Address		
Directors		
Chair		
Trustee will execute documents as:		
Natural person	<input type="checkbox"/>	
A company will execute documents in one of the following ways in accordance with its constitution:		
Director and second director or secretary	With seal <input type="checkbox"/>	Without seal <input type="checkbox"/>
Sole director and sole secretary	<input type="checkbox"/>	<input type="checkbox"/>
Sole director and no secretary	<input type="checkbox"/>	<input type="checkbox"/>



Trustee of Fixed Trust (Custodian)		
Full name		
ACN		
Address		
Directors		
Chair		
Trustee will execute documents as:		
Natural person	<input type="checkbox"/>	
A company will execute documents in one of the following ways in accordance with its constitution:		
Director and second director or secretary	With seal	Without seal
	<input type="checkbox"/>	<input type="checkbox"/>
Sole director and sole secretary	<input type="checkbox"/>	<input type="checkbox"/>
Sole director and no secretary	<input type="checkbox"/>	<input type="checkbox"/>

<b>Lender</b>		
Full name		
ACN		
Name of Trust		
Address		
Directors		
Chair		
Lender will execute documents as:		
Natural person	<input type="checkbox"/>	
A company will execute documents in one of the following ways in accordance with its constitution:		
	With seal	Without seal
Director and second director or secretary	<input type="checkbox"/>	<input type="checkbox"/>
Sole director and sole secretary	<input type="checkbox"/>	<input type="checkbox"/>
Sole director and no secretary	<input type="checkbox"/>	<input type="checkbox"/>
<b>Loan particulars</b>		
Loan amount		
Interest rate		
Loan term or at call		
Frequency of repayments and interest		
Date of repayments and interest		
<b>Asset details</b>		
Address of property/ name of shareholding company		
Title particulars/ no. of shares		