

Step 4 – Trustee(s) details (Continued)

SECTION A

Climer Super includes establishment of the company with your chosen company name, directors, shareholders etc in place. You will be provided with all the necessary forms to enable this to occur in the Establishment Package. At this stage we just need the proposed name to make sure it is available and so we can provide you with the appropriate fund Establishment Package.

Preferred company name (e.g. Jones Family Super Fund Pty Ltd)

Please note we are required to search the ASIC register of company names to make sure this name, or a name similar to it is not already in use by another company. If none of the proposed names below are available we will contact you and you will need to choose another name.

First preference

Second preference

Third preference

Registered office

Suburb State Postcode

Telephone - Fax -

SECTION B

Trustee/Director 1

Title Mr Mrs Ms Miss Dr Date of birth / /

Gender Male Female

Town/city of birth

Country of birth

Given names

Surname

Street address

Suburb State Postcode

Telephone - Fax -

E-Mail

Will this person also be a member of this self-managed super fund?

No or Yes

Step 4 – Trustee(s) details (Continued)

Trustee/Director 2

Title Mr Mrs Ms Miss Dr

Date of birth / /

Gender Male Female

Town/city of birth

Country of birth

Given names

Surname

Street address

Suburb

State

Postcode

Telephone

 -

Fax

 -

E-Mail

Will this person also be a member of this self-managed super fund?

No or Yes

Trustee/Director 3

Title Mr Mrs Ms Miss Dr

Date of birth / /

Gender Male Female

Town/city of birth

Country of birth

Given names

Surname

Street address

Suburb

State

Postcode

Telephone

 -

Fax

 -

E-Mail

Will this person also be a member of this self-managed super fund?

No or Yes

Step 4 – Trustee(s) details (Continued)

Trustee/Director 4

Title Mr Mrs Ms Miss Dr

Date of birth / /

Gender Male Female

Town/city of birth

Country of birth

Given names

Surname

Street address

Suburb

State

Postcode

Telephone

 -

Fax

 -

E-Mail

Will this person also be a member of this self-managed super fund?

No or Yes

Step 6 – Signatures

Don't forget to sign and return this form.
You should also keep a copy for your records.

By signing below, I/we declare that I/we:

- agree to acquire the Clime Super Service and understand this includes both the Establishment Services and the Administration Services.
- agree to the cost of the Establishment Services referred to in the Administration Agreement and wish to proceed with establishment of a self-managed super fund and corporate trustee, in accordance with the information entered on this Application.
- agree to the cost of the Administration Services referred to in the Administration Agreement and understand that the Trustee(s) indicated in Section B of this Application will be required to enter into an Administration Agreement detailing these services .

Trustee/Director 1

Signature

X

Date / /

Trustee/Director 2

Signature

X

Date / /

Trustee/Director 3

Signature

X

Date / /

Trustee/Director 4

Signature

X

Date / /

Please make cheque payable to '**Clime Super**' and send the cheque and completed Application form to:

Clime Super
Locked Bag 3001
Edgecliff NSW 2027
Telephone: 02 9328 6726
Email: admin@climesuper.com.au