



CAVENDISH

SMSF LIMITED RECOURSE BORROWING ARRANGEMENT INSTRUCTION SHEET

SUPER FUND DETAILS

Fund Name			
Trustee 1 Name		ACN (if company)	
Trustee1 Address			
Trustee 2 Name			
Trustee 2 Address			
Trustee 3 Name			
Trustee 3 Address			
Trustee 4 Name			
Trustee 4 Address			

BARE TRUST DETAILS

Proposed Name of Bare Trust	<div>e.g. The Smith Security Trust or The Smith Bare Trust, etc.</div>
Bare Trustee Name	
ACN (if company)	
Bare Trustee Address	

ASSET

Details of Asset being aquired	Asset Details:
	Street Address
	Certificate of Title/Folio Identifier:

LOAN

(only complete this section if loan documents required for a a non-bank lender)

Details of Lender
and Loan
(if related party)

Loan Amount

\$	Interest Rate	%	Fixed <input type="radio"/>	Variable <input type="radio"/>
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Term

YRS	MTHS	Secured	Y/N	If Secured	Registered <input type="radio"/>
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Unregistered ☐

Repayment Terms

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e.g Principal and Interest Payable Monthly in Arrears

ATTACHMENTS

Fund Trust Deed

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Sale and Purchase Contract (if available)

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Security Trust Company Incorporation Application Form (if required)

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REQUEST FOR LEGAL SERVICES

1. Preparation of Security Trust Deed (as requested by Section 67A of the SIS Act)

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\$1,170

2. Establishment of Corporate Trustee

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\$895

3. Amendment to Superannuation Fund Trust Deed (if required)

☐

\$620

4. Preparation of related party loan documentation (or review externally prepared loan documentation)

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\$1,530

AUTHORISATION

Applicant's Signature

	Date	
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