

# Service Payment Instruction

**PLEASE: Complete all details clearly in block letters**

Name of Fund: \_\_\_\_\_

## **SECTION A: ADVISOR/PERSON ORDERING SERVICE**

*(Documents, invoice and receipts will be directed C/- this person, unless otherwise stated)*

Person placing Order: \_\_\_\_\_

Firm Name (if applicable): \_\_\_\_\_

Postal Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

## **SUPER PLUS - Professional Fess – (Appropriate order form must also be attached)**

- |  |                          |   |
|--|--------------------------|---|
| New SMSF Establishment (individuals)   | <input type="checkbox"/> | \$660 (\$600 + GST)                       |
| New SMSF set-up + Trustee Company  | <input type="checkbox"/> | \$1,390 (\$900 + GST plus \$400 ASIC fee) |
| Trustee Company only (existing SMSF)<br>(Deed of appointment may also be required) | <input type="checkbox"/> | \$730 (\$300 + GST plus \$400 ASIC fee)   |
| Deed of Appointment/Resignation  | <input type="checkbox"/> | \$308 (\$280 + GST)                       |
| Pension Establishment  | <input type="checkbox"/> | \$423.50 (\$385 + GST)                    |

## **FINANCIAL PLANNER/ADVISER – Arrangement Professional Fees**

**For Advisers time in the arrangement of the designated service or transfer of an existing SMSF.**

**Fees paid to person named in order section above. This fee will show on the clients statement separately (For Financial Planners/Advisers, fees are paid to their AFSL dealer)**

Fee to be charged (including GST) - Select 1 only

- \$220       \$330       \$440       Other - \$\_\_\_\_\_

**TOTAL FEES (total of all selected fees on this form) \$\_\_\_\_\_ incl GST**



**PAYMENT OPTIONS**

- Debit my existing Macquarie account (account and Super Plus Authority must already exist)
- Deferred Settlement (from funds rolled into Macquarie account)\*\*

**(\*\* When the SMSF is set-up via an Adviser registered with Super Plus and Super Plus are providing fund administration a deferred settlement option is available for the Trust Deed/Set-up fee (not for company trustee portion of cost as listed) this is settled from rollover or contributions when received – to a maximum of 90 days delay) NOT AVAILABLE FOR DIRECT CLIENTS**

Cheque payable to Super Plus Australia Pty Ltd for \$ \_\_\_\_\_

Charge my credit card for the amount of \$ \_\_\_\_\_  
(Credit card only acceptable for payment when establishing a new fund)

MasterCard          Visa          (please circle one)

Name on Card: \_\_\_\_\_ Expiry Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Card Number:                        

Please note if the costs are personally paid by the Trustees of the self-managed superannuation fund, the trustees may reimburse themselves for the cost only, (not their time) once sufficient monies are in the fund.

**SPECIAL INSTRUCTIONS**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**MAILING DETAILS**

Please mail the completed form with the appropriate payment to:

Super Plus Australia Pty Ltd                      Phone: (07) 3211 8766  
GPO Box 734    Fax: (07) 3211 8799  
BRISBANE QLD 4001                                Email: admin@superplus.net.au

**SECTION F: ACKNOWLEDGEMENT AND DISCLAIMER**

Super Plus arranges all documents (Deeds and companies prepared by a legal professional) based on the information provided to us. Please ensure clear and correct instructions are provided as Super Plus will not be held responsible for any errors arising from incorrect information given. Charges may be incurred to prepare additional documents if an error is located in the information provided.

**PERSON ORDERING THE SERVICE (IF ADVISER ARRANGEMENT FEE CHARGED – CLIENT MUST SIGN)**

\_\_\_\_\_  
**Signature**    **Print Name**    **Date**