

PLEASE USE BLOCK LETTERS.

Please forward this form complete with member signature to:

Multiport Pty Ltd
PO Box N316,
Grosvenor Place, NSW 1220

Please direct any enquiries to us by phone on 1300 364 672 or by email to help@multiport.com.au

The SMSF Gearing Package is only available to Multiport SMSF administration clients.

PACKAGE OPTIONS (PLEASE SELECT ONE ONLY)

- Essentials Gearing Package** – all documentation where loan arranged by you
- Related Party Gearing Package** – all documentation for a loan from a member(s) of the fund

SECTION 1 – SUPERANNUATION FUND DETAILS

Fund name

Trustee (if company) Australian business number (ABN)

Trustee (if individuals)

SECTION 2 – PROPOSED SECURITY TRUST DETAILS

Proposed security trustee company name

Registered office address

Multiport – Please select if you would like to use the Multiport Corporate Trustee service.

Other

Principal place of business address if different to above

Full registered office address Town/suburb State Postcode

Security Trustee Officers and shareholders

All parties will be appointed a director and issued with one ordinary share. Please complete details for each party. Please note, the primary contact will be appointed as company secretary.

	Person A (Primary contact)	Person B	Person C	Person D
Surname	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
First name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Middle names	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Residential address				
Town of birth				
Country of birth				

SECTION 3 – INTENDED INVESTMENT DETAILS (IF KNOWN)

Property street address

Residential Commercial Rural

Expected date of acquisition Purchase price

Complete this section if you are applying for an Essentials Gearing Package

Loan details

Name of lender

Complete this section if you are applying for a Related Party Gearing Package

Loan details

Name of lender

%

Loan amount required Initial interest rate Loan term

Repayments: Interest only Principal and interest Interest rate: Fixed Variable

SECTION 4 – ADVISER DETAILS

Surname Given name

AFSL number Licensee name

Postal address Town/suburb State Postcode

Street address Town/suburb State Postcode

Telephone Facsimile Email

SECTION 5 – PAYMENT DETAILS

We will process your gearing package upon payment of the applicable fee.

Please indicate your preferred method of payment:

- Cheque. Please attach and make payable to Multiport Pty Ltd.
- Direct debit. Please complete the direct debit authority section.
- Electronic funds transfer (EFT).

Account name: Multiport Pty Ltd

Bank: Macquarie Bank

BSB: 182-222

Account: 119959989

Please use your super fund name as a reference to allow quicker identification of your payment.

- Debit my existing SMSF – only available where the SMSF is administered by Multiport.

SECTION 6 - REQUEST AND AUTHORITY TO DEBIT

Your Surname or company name

 "you"

Your Given names or ABN/ARBN

request and authorise **Multiport Pty Ltd 396595** to arrange, through its own financial institution, a debit to your nominated account any amount Multiport Pty Ltd, has deemed payable by **you**.

This debit or charge will be made through the Bulk Electronic Clearing System (BECS) from **your** account held at the financial institution you have nominated below and will be subject to the terms and conditions of the Direct Debit Request Service Agreement.

SECTION 7 - INSERT THE NAME AND ADDRESS OF FINANCIAL INSTITUTION AT WHICH ACCOUNT IS HELD

Financial institution name

Address

SECTION 8 - INSERT DETAILS OF ACCOUNT TO BE DEBITED

 -

Account name

BSB

Account number

SECTION 9 - ACKNOWLEDGMENT

By signing and/or providing us with a valid instruction in respect to your Direct Debit Request, you have understood and agreed to the terms and conditions governing the debit arrangements between you and Multiport Pty Ltd as set out in this Request and in your Direct Debit Request Service Agreement.

SECTION 10 - INSERT YOUR SIGNATURE AND ADDRESS

Address

Signature (If signing for a company, sign and print full name and capacity for signing eg. director)

Date

SECOND ACCOUNT SIGNATORY (IF REQUIRED)

Address

Signature (If signing for a company, sign and print full name and capacity for signing eg. director)

Date

SECTION 11 – PRIVACY STATEMENT

Multiport collects personal information from you, your nominated adviser and other (prospective) members of your SMSF.

Our main purpose in collecting personal information is to establish and/or administer your SMSF. If you do not provide the information necessary to process your application for SMSF services, then we may not be able to process it.

We may collect personal information if it is required or authorised by under the various financial services laws. If you use our services through an intermediary (such as a financial adviser, stockbroker or accountant), we will not use your information for the purposes of direct marketing without the consent of that intermediary. If you use our services directly (not through an intermediary), we may also use your personal information for related purposes, such as keeping you informed of new services or special arrangements offered or distributed by us. Again, when conducting our marketing activities, we may disclose some personal information to our service providers. You can opt out of receiving direct marketing information from us at any time.

We usually disclose information of this kind to:

- other members of the AMP group
- other members of your SMSF
- your financial planner or broker (if any)
- external service suppliers both here and overseas. A list of countries where these providers are likely to be located can be accessed via our Privacy Policy
- to Regulators such as Australian Taxation Office (ATO)
- anyone you authorise/nominate, or if required by law.

If sensitive information is collected, for example health information or membership of a professional association, additional restrictions apply. The primary purpose for collecting and holding sensitive information is to administer your SMSF's records of insurance held through your SMSF. We may disclose sensitive information to your nominated adviser or other trustees/trustee directors of your SMSF, anyone you have authorised or if required by law.

Under the Multiport Privacy Policy, you may access personal information about you held by us. The Multiport Privacy Policy sets out our policy on management of personal information, including information about how you can access your personal information, seek to have any corrections made on inaccurate, incomplete or out-of-date information, how you can make a complaint about privacy and information about how we deal with such complaints. You may obtain a copy by contacting us on 1300 364 672 or visiting multiport.com.au

Please note: If the SMSF is not currently administered by Multiport, please complete and submit a Multiport SMSF application form with this application.

SECTION 7 – DECLARATIONS AND CONSENTS

I/We acknowledge that Multiport and my/our adviser (as nominated in section 4) will collect my/our personal information in relation to my/our SMSF Gearing Package in accordance with the above privacy policy.

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

I/We have received a copy of the current SMSF Gearing Package guide.

I/We acknowledge that Multiport will require certain documents and information to arrange the establishment of the SMSF, Security Trust and ongoing administration of the SMSF and its underlying assets.

I/We are, or will become, a Multiport administration client and acknowledge that provision of this gearing package service is only available to Multiport administration clients.

I/We have sought or received specific advice from a representative under an AFSL on the super borrowing rules and conditions, and Multiport has not provided advice about the arrangement or its suitability.

I/We instruct Multiport to provide the necessary documentation to establish the above arrangements on my/our behalf.

I/We hereby authorise Multiport to deduct and pay from the fund's cash account/bank account its fees as agreed in writing, and my/our adviser or a third party as set out in this document.

I/We declare that I/we hold the consents by each officer and member of the company as required by S117(2) of the Corporations Act 2001 and authorise Multiport Pty Ltd to make an application for company registration as my/our agent.

Fund trustee signature

Name

Signature

Date

Address
Level 10,
50 Bridge Street
Sydney NSW 2000

Postal address
PO Box N316,
Grosvenor Place
NSW 1220

Telephone 1300 364 672
Facsimile 02 9257 5399
Email help@multiport.com.au
Website multiport.com.au

