

If you are not a user of our daily or annual Multiport SMSF administration service, there are some limitations on the gearing solution we can provide you with as we will not have access to your fund details. Key features we can not provide include:

- We can not arrange the stamping of Security Custodian Trust
- We can not check the accuracy of the information you have supplied on the application
- We do not provide any financial advice as part of this service.

SECTION 1 – SUPERANNUATION FUND DETAILS

Fund name

Trustee (if company)

Australian business number (ABN)

SECTION 2 – PROPOSED SECURITY TRUST DETAILS

Proposed security trustee company name

Registered office address

Full registered office address

Town/suburb

State

Postcode

Principal place of business address if different to above

Full registered office address

Town/suburb

State

Postcode

SECTION 3 – TRUSTEES, DIRECTORS & SHAREHOLDERS

Please complete the details below for any individuals who are trustees of the SMSF or the Security Trust. For the security Trust each person will be issued a single share and 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	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Town of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Country of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Please indicate	<input type="checkbox"/> SMSF individual trustee <input type="checkbox"/> SMSF Trustee Director <input type="checkbox"/> Director of Security Trustee	<input type="checkbox"/> SMSF individual trustee <input type="checkbox"/> SMSF Trustee Director <input type="checkbox"/> Director of Security Trustee	<input type="checkbox"/> SMSF individual trustee <input type="checkbox"/> SMSF Trustee Director <input type="checkbox"/> Director of Security Trustee	<input type="checkbox"/> SMSF individual trustee <input type="checkbox"/> SMSF Trustee Director <input type="checkbox"/> Director of Security Trustee

SECTION 4 – 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 5 – 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 6 – PAYMENT DETAILS

Once we receive your application we will issue you an invoice for this SMSF Gearing Solutions package request.

Once the invoice has been paid we will proceed with processing your application.

Please advise the full name the invoice should be addressed to.

Please indicate your preferred method of payment for the invoice.

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.

SECTION 7 - 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 8 - INSERT THE NAME AND ADDRESS OF FINANCIAL INSTITUTION AT WHICH ACCOUNT IS HELD

Financial institution name

Address

SECTION 9 - INSERT DETAILS OF ACCOUNT TO BE DEBITED

Account name

BSB

Account number

SECTION 10 - 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 11 - 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 12 – SUBMITTING YOUR FORM

You can submit your application form via email or post:

A signed and scanned copy

Email: help@multiport.com.au

A printed and signed copy

Postal address:
PO Box N316
Grosvenor Place
Sydney NSW 1220

SECTION 13 – 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

SECTION 14 – DECLARATIONS AND CONSENTS

I/We acknowledge that Multiport and my/our adviser (as nominated in section 5) 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 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

