How can we help?

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Create a trust account

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At Swyftx, we offer trust accounts, which we also refer to as **entity accounts**. Entity accounts include trusts, companies, and self-managed super funds (SMSFs).

This information is specifically for trust accounts. Find out how to create a company account or SMSF account.

Before you begin

✓ You must have a verified personal Swyftx account to complete this application. Find out how to create an account.

✓ All trustees of the Trust and named beneficiaries over the age of 18 must have verified personal Swyftx accounts.

Step 1: Prepare the required documents

The documents required for this application are different depending on if you're in Australia or New Zealand. We do not accept the registration of company documents.

Australia

✓ A current full company information extract from the ASIC website. Find out how to download a company information extract.

✓ If your shareholdings are non-beneficially held, you must also provide the Trust Deed, which depicts the beneficial holdings of those shares.

New Zealand

✓ A current full company information extract from the New Zealand Companies Register website. Find out how to download a company information extract.

✓ If your shareholdings are held in a trust, you must also provide the Trust Deed, which depicts the beneficial holdings of those shares.
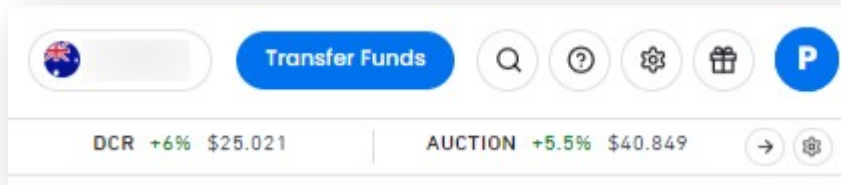
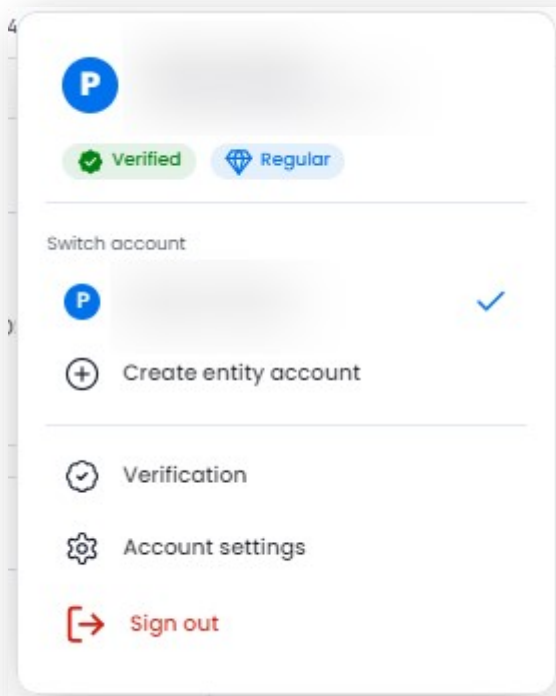# Step 2: Complete the application through your personal Swyftx account

Web	App

Web

1   Click on your **circled initial** in the corner of the top menu bar.

2   Under **Switch account** in the dropdown, select **Create entity account**.

3   Select **I understand**, **Continue**, then **Continue** to start your application.

4   Enter your details in the Step-by-Step Entity Account Creation Form.

What happens next?

Our team will review your application within **1 business day** and let you know if we need more information.

All parties included in the application will receive an invitation by email to join the entity account, so you can tell them to expect an email from us.

The application will only progress when all members have accepted the email invitation and all accounts are verified users on Swyftx.

Finally, we will send you a message when the account is ready.

Further assistance

If you require additional support during the process, book a consult call with one of our account specialists.

Book a consult

Accessing your entity account

App	Web

App

1   Expand the side menu and select **Switch account** from the bottom of the menu.

Swyftx strongly encourages the addition of **two-factor authentication (2FA)**. 2FA is the most significant upgrade you can make for your account security.

Read more: Set up two-factor authentication

Was this article helpful?

✓ Yes   ✗ No

Related articles

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Need some more help?

Our support team are here to answer your questions.

Chat to support

swyftx

Milton, Brisbane, Queensland, 4064

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