



Hi X,

Congratulations on the set up of your new Self Managed Superannuation Fund! To make your life easier we have prepared a step by step instruction guide which will help you get the fund up and running as soon as possible.

### **Step 1 - Sign all set up documents**

Please print all documents included in the "SMSF Set up Documents" file. Sign all of documents where indicated and send a copy to us for our records. Keep the original signed documents safe.

### **Step 2 - Open a bank account**

Once you receive the notification of the ABN and TFN from the ATO, please take following documents to your bank of choice to open a bank account:

1. Certified copies of the following pages from your SMSF Deed; page 1 (Title page), page 40 (Schedule 1) and last two pages of signatures.
2. The ABN and TFN notification letter.

### **Step 3 - Complete and send our forms**

Once the bank account of your SMSF has been set up, please complete and sign the attached Banklink Authority Form and return the **original form** to our office by post. You can keep a copy of the forms for your records. Please note that the Banklink Authority Form requires the signature of a witness.

### **Step 4 - Rollover your existing superannuation balance**

Once the bank account of your SMSF has been set up, please contact your current superannuation provider and organise the rollover forms to be sent to you. Ensure that you specify that you want to rollover your super from the account you currently hold with them to your own self managed superfund (otherwise there is a good chance they will send the wrong form).

Once you receive the form, complete and sign the form and return to your current superannuation provider with any supporting documents they require. If you need any help completing the form please don't hesitate to contact us. Each superannuation provider is different and can request different supporting documents, however all superannuation providers should *at least* require;

1. Certified copies of the following pages from your SMSF Deed; page 1 (Title page), page 40 (Schedule 1) and last two pages of signatures.
2. The ABN of your SMSF.

Need help with any of these steps? Please don't hesitate to contact our office.

Regards,

**Mukund Unadkat CPA**

SMSF Specialist Adviser  
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