

| Applications | | |
|--------------|---|-------------|
| Done | Description | Assigned to |
| | ABN | |
| | TFN | |
| | GST | |
| | Stamp duty (When is a trust) Then send copy of the invoice to Marie to pay the State Revenue Office (SRO) | |
| | Income turnover | |
| | Industry (Please add as much details as you can to pick up the right option) | |
| | Workcover registration | |
| | PAYG withholding application (No. of employees, expecting tax withheld and role) | |

| XPM | | |
|------|---|-------------|
| Done | Description | Assigned to |
| | Check all the details contact and relationship are matching with the company constitution/ trust deed | |
| | Make sure that contact details and contacts section are completed | |

| DocuSign | | |
|----------|--|-------------|
| Done | Description | Assigned to |
| | Send the company establishment & form 362 / trust deed to the client for signing through DocuSign. | |

| CAS 360 | | |
|---------|--|-------------|
| Done | Description | Assigned to |
| | Add the company in CAS 360 | |
| | Prepare form 362, make sure is also lodged after client sign | |
| | Request form A71 to upload ASIC data into CAS360 | |

| Signed Documents received | | |
|---------------------------|---|-------------|
| Done | Description | Assigned to |
| | Double check that the attached reports has been signed correctly | |
| | Rename the files at the end add "Signed" | |
| | Save each individual file in SF under Corporate secretarial _Permanent documents Folder (if there is not one, please create it) | |
| | Save the signed trust documents under CAS 360. If company, under XPM – "Permanent Docs" & Corporate Secretarial folder. | |
| | Send a copy of the certified trust/company established to the client. Dominic is required to stamp these copies. | |

| SMSF Only | | |
|-----------|---|-------------|
| Done | Description | Assigned to |
| | ATO Trustee Declaration Form for each director | |
| | Change of details for superannuation entities (mail / out to ATO) | |

Extra Notes