**SMSF Investment Strategy**

**Person ordering**

|  |  |
| --- | --- |
| Name:       |  |
| Firm Name:       | Member Number:       |
| Phone:       |  | Email:       |

**Payment details**

Please provide credit card details for payment of **$165**

**Please ensure that you provide a copy of the latest SMSF Trust Deed when submitting the order form.**

|  |  |  |  |
| --- | --- | --- | --- |
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**Section A: Fund Details**

|  |  |
| --- | --- |
| Name of Fund:       |  |

**Section B: Corporate Trustee Details (if applicable)**

|  |  |  |
| --- | --- | --- |
| Trustee Company Name:       |  |  |
| ACN:       |  |  |
| Address:       |  |  |
| Suburb:       | State & Post Code: |       |

**Please complete all details in legible handwriting and provide full legal names.**

**Return completed form to info@docscentre.com.au**



 **SMSF Investment Strategy**

**Section C: Individual Trustees/Members**

|  |  |  |
| --- | --- | --- |
| Full Name:       | [ ]  Director | [ ]  Employed |
| Date of Birth:       /       /       | [ ]  Trustee | [ ]  Will make future contributions |
| Address:       |  | [ ]  Member | [ ]  Retiring within 2 years |
| Suburb:        | State & Post Code:       |  |

|  |  |  |
| --- | --- | --- |
| Full Name:       | [ ]  Director | [ ]  Employed |
| Date of Birth:       /       /       | [ ]  Trustee | [ ]  Will make future contributions |
| Address:       |  | [ ]  Member | [ ]  Retiring within 2 years |
| Suburb:        | State & Post Code:       |  |

|  |  |  |
| --- | --- | --- |
| Full Name:       | [ ]  Director | [ ]  Employed |
| Date of Birth:       /       /       | [ ]  Trustee | [ ]  Will make future contributions |
| Address:       |  | [ ]  Member | [ ]  Retiring within 2 years |
| Suburb:        | State & Post Code:       |  |

|  |  |  |
| --- | --- | --- |
| Full Name:       | [ ]  Director | [ ]  Employed |
| Date of Birth:       /       /       | [ ]  Trustee | [ ]  Will make future contributions |
| Address:       |  | [ ]  Member | [ ]  Retiring within 2 years |
| Suburb:        | State & Post Code:       |  |

|  |  |  |
| --- | --- | --- |
| Full Name:       | [ ]  Director | [ ]  Employed |
| Date of Birth:       /       /       | [ ]  Trustee | [ ]  Will make future contributions |
| Address:       |  | [ ]  Member | [ ]  Retiring within 2 years |
| Suburb:        | State & Post Code:       |  |

|  |  |  |
| --- | --- | --- |
| Full Name:       | [ ]  Director | [ ]  Employed |
| Date of Birth:       /       /       | [ ]  Trustee | [ ]  Will make future contributions |
| Address:       |  | [ ]  Member | [ ]  Retiring within 2 years |
| Suburb:        | State & Post Code:       |  |



**SMSF Investment Strategy**

**Section D: Considerations**

**Please answer all of the following questions:**

|  |  |  |
| --- | --- | --- |
| Will the fund invest in real property via Limited Recourse Borrowing Arrangement? | [ ]  Yes | [ ]  No |
| Will the trustee hold life or TPD insurance on behalf of the fund Members? | [ ]  Yes | [ ]  No |
| Will the fund have diversified assets?  | [ ]  Yes | [ ]  No |
| Will a fund member likely have a Total Super Balance in excess of $3 million by 2025?  | [ ]  Yes | [ ]  No |
| Will the fund be investing in derivatives such as options?  | [ ]  Yes | [ ]  No |
| Will cash have a minimum & maximum range of 0 to 100%? | [ ]  Yes | [ ]  No |
| Over a ten-year period, what percentage investment returns above CPI will the fund aim to achieve?       |

**Section E: Asset Allocations**

Please indicate the low, high and target percentages against the appropriate labels. The columns do not need to total to 100%. You can leave blank the categories that are not applicable.

|  |  |  |  |
| --- | --- | --- | --- |
| **Asset Type** | **Low %** | **High %** | **Target %** |
| Cash |       |       |       |
| Australian Fixed Interest |       |       |       |
| International Fixed Interest |       |       |       |
| Australian Listed Shares & Units |       |       |       |
| Australian Unlisted Shares & Units |       |       |       |
| International Shares & Units |       |       |       |
| Australian Real Property |       |       |       |
| International Real Property |       |       |       |
| Mortgage Funds |       |       |       |
| Managed Funds |       |       |       |
| Structured Products |       |       |       |
| Crypto Currencies |       |       |       |
| Digital Assets |       |       |       |
| Collectibles |       |       |       |
| Precious Metals |       |       |       |
| Derivatives, Options, Warrants |       |       |       |
| Other |       |       |       |

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