**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.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| On Account\* | Visa | Mastercard | | Amex |
| Card Holder Name: | | | | |
| Credit Card Number: | | | | |
| Expiry Date:       / | | | Authorised Card Signature: | |

All prices include GST, and the documents will be sent to the nominated email address in PDF format.

Note that our staff will call you to request the CVV when payment is processed.

\*To pay on account you must have a current On Account Agreement with Docscentre.

**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**



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**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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