**Custodian/Bare Trust**

**Person ordering**

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

**Payment details**

Please select required products and provide credit card details for payment.

|  |  |  |  |
| --- | --- | --- | --- |
| Custodian/Bare Trust | [ ]  **$660** | Title Search | [ ]  **$55** |
| Limited recourse loan agreement | [ ]  **$660** | Slimline Delivery | [ ]  **$66** |
|  |  |  |  |

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

 All prices include GST and the documentation 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: SMSF Details**

|  |  |  |
| --- | --- | --- |
| SMSF Name:       |  |  |
| SMSF Trustee Name:       |  |  |
| Trustee ACN (if a company):       |  |  |
| Trustee/Officer name and Role:        | [ ]  Director | [ ]  Secretary |
| Trustee/Officer name and Role:        | [ ]  Director | [ ]  Secretary |
| Trustee/Officer name and Role:        | [ ]  Director | [ ]  Secretary |
| Trustee/Officer name and Role:        | [ ]  Director | [ ]  Secretary |

**Please complete all details and provide full legal names. Handwritten forms must be legible.**

**Please return the completed form, a complete copy of the current signed SMSF trust deed and a copy of the relevant sale contract to** **info@docscentre.com.au**



**Custodian/Bare Trust**

**Section B: Bare Trust Details**

|  |  |  |
| --- | --- | --- |
| Trust Name:       |  |  |
| Trustee Name:       |  |  |
| Trustee ACN (if a company):       |  |  |
| Officer name and Role:        | [ ]  Director | [ ]  Secretary |
| Officer name and Role:        | [ ]  Director | [ ]  Secretary |
| Officer name and Role:        | [ ]  Director | [ ]  Secretary |
| Officer name and Role:        | [ ]  Director | [ ]  Secretary |

**Section C: Asset Details**

|  |  |
| --- | --- |
| Address: |       |
| Suburb: |       | State & Post Code: |       |
| Property Description: |       |
| Title Reference:  |       | Volume: |       | Folio: |       |

**Section D: Loan Details** (onlycomplete for related party borrowing arrangements)

|  |  |  |  |
| --- | --- | --- | --- |
| Loan Terms:  |  | [ ]  | Benchmark to PCG 2016/5  |
| **OR**  |  | [ ]  | Benchmark to formal loan offer made by a financial institution  |
|  | (please provide a copy of the formal loan offer) |
| Is this a refinance?  |  | [ ]  Yes  | [ ]  No  |
| Loan Amount: $      | (only include the remaining balance of the loan if this is a refinance) |
| Interest Rate:       | (Note that if the loan is made by a related company the rate of interest will be the  |
|  |  higher of the Div7A benchmark rate, or the PCG 2016/5 rate) |
| Term of loan:        | (Note that the safe harbour term of loan is not more than 15 years. |
|  |  If this is a refinance reduce this by the period already expired) |
| Payments:  | [ ]  | Fixed for 5 years interest only and then P & I  |
| **OR**  | [ ]  | P & I |  |
| Will the loan be secured by mortgage over the Asset?  | [ ]  Yes | [ ]  No |
| If Yes, we will facilitate preparation and registration of a mortgage which will incur an additional cost which will be advised to you prior to proceeding. |

Continued over page

**Custodian/Bare Trust**

**Section D: Loan Details continued**

|  |  |  |
| --- | --- | --- |
| Lender Name:       |  |  |
| Lender ACN (if a company):       |  |  |
| Lender/Officer name and Role:        | [ ]  Director | [ ]  Secretary |
| Lender/Officer name and Role:        | [ ]  Director | [ ]  Secretary |
| Lender/Officer name and Role:        | [ ]  Director | [ ]  Secretary |
| Lender/Officer name and Role:        | [ ]  Director | [ ]  Secretary |

By completing this order form and returning to Docscentre you confirm that you have read and accepted our terms and conditions which can be found here – [www.docscentre.com.au/terms-and-conditions/](http://www.docscentre.com.au/terms-and-conditions/)

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| --- |
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| A picture containing application  Description automatically generated  Because it’s a jungle out there. Since 1983 |
| Logo  Description automatically generated The Voice of the Tax Agent community. Since 1992 |
| A logo with a castle in the middle  Description automatically generated  Partnering with you to get it right. Since 1995 |