

Superannuation Gearing Bare Trust Instructions

Name of Bare Trust:.....

PROPERTY DETAILS

Street Address: Suburb & State:

(Certificate of Title details) Lot Number: on Diagram/Plan/Strata Plan (please circle) number:

Volume: Folio:

* please provide a copy of an up-to-date Landgate search of the Certificate of Title - if you prefer we can conduct the search for you Yes or No

* If property details won't be known until a later time, the documents can be prepared in advance and details inserted when available.

BANK/LENDER

Name of Bank/Lender:.....

Is a related party included as Seller or Lender to the Super Fund? Yes or No

TRUSTEE OF BARE TRUST DETAILS

Name of Trustee Company:.....ACN:.....

Address:

Directors Names:

SUPER FUND/BENEFICIARY OF BARE TRUST DETAILS

Name of Super Fund:.....

Name of Trustee:.....ACN.....

** (see below – the fund may need to switch to having a corporate trustee)

Directors Names (if applicable):

Address:

(If more than one Beneficiary/Super Fund, please indicate percentage interests in the Property – multiple trusts required)

IMPORTANT!

- Corporate and Trustee Minutes/Resolutions and explanatory Flow Diagram are recommended for the transaction.
- A new single purpose company should be used to carry out the sole function of being Trustee of this bare trust.
- The Trustee of this bare trust can not be the same company as the Trustee of the super fund or any other trust (other than another bare trust for the same client).
- Only one property or share in a property can be held in each bare trust.
- Most major banks now require a corporate trustee of the super fund. You can order this company, change of trustee deed and any necessary super fund update at the same time on the PantherCorp website.
- The super fund requires various powers in its rules to enter into a super gearing transaction. The current PantherCorp super fund deed and current PantherCorp super fund update contains these powers. Other deeds/rules may not.
- The location of the property will determine the governing law and location of the trust.
- Provision of this bare trust does not guarantee any particular financial, taxation or other outcome as Trainor Legal and PantherCorp do not provide taxation, accounting or superannuation advice (structure only).

ALSO AVAILABLE FOR YOUR CONVENIENCE

Also available: 2 sets of Minutes/Resolutions for SMSF and Bare Trust evidencing entry into limited recourse borrowing transaction under SIS and establishment of necessary bare trust arrangement and transaction flow diagram

Yes No

Legal advice, conference, further explanation, further diagrams – price on application/depends on requirements:

Yes No

For related party transactions: lease from super fund to related party Yes No

Transfer duty exemption for purchase from Member Yes No

APPLICANT DETAILS

Firm Name:.....Contact Person:

Address:.....

Ph: Email:

Payment Details: (inc GST)

\$1,045.00 – includes trust deeds, detailed letter summarising process, full set of corporate and trustee Minutes/Resolutions and Flow Diagram for transaction

\$797.50 - includes trust deeds, detailed letter summarising process and Landgate Search, no other documents

\$770.00 – includes trust deeds and detailed letter summarising process, no other documents

Direct Deposit (BSB: 124-001 Account Number: 0104 8552) or Charge our Credit Card : Visa Mastercard

Card Number:.....Expiry Date:.....

Name of Cardholder : Signature