



Existing Fund Client Engagement Form

Individual Trustee

By signing and submitting this form you acknowledge that:

- You have read the Terms and Conditions of our service and accept and understand them;
- You have read and understand the Fee Schedule provided to you;
- You verify that all information provided is true and accurate; and
- You consent to us providing your data to third parties in order to provide our services to you.

Please ensure you attach a copy of each Member's Drivers license front and back.

Existing Fund Client Engagement Form - Individual Trustee

Fund Name

Fund ABN

Fund TFN

Bank

BSB

Account

Trustee/Member 1

This Trustee is a Member of the Fund

Title

Mr

Mrs

Ms

Miss

Dr

Given name(s)

Surname

Residential Address

Date of Birth

Place of Birth

Occupation

Tax File Number

Telephone Number

Email Address

Signature

Date

Existing Fund Client Engagement Form - Individual Trustee

Trustee/Member 2

☐ This Trustee is a Member of the Fund

Title Mr Mrs Ms Miss Dr

Given name(s)

Surname

Residential Address

Date of Birth

Place of Birth

Occupation

Tax File Number

Telephone Number

Email Address

Signature

Date

Trustee/Member 3

☐ This Trustee is a Member of the Fund

Title Mr Mrs Ms Miss Dr

Given name(s)

Surname

Residential Address

Date of Birth

Place of Birth

Occupation

Tax File Number

Telephone Number

Email Address

Signature

Date

Existing Fund Client Engagement Form - Individual Trustee

Trustee/Member 4

This Trustee is a Member of the Fund

Title Mr Mrs Ms Miss Dr

Given name(s)

Surname

Residential Address

Date of Birth

Place of Birth

Occupation

Tax File Number

Telephone Number

Email Address

Signature

Date

Adviser Details

Title Mr Mrs Ms Miss Dr

Name

Company Name

Address

Telephone Number

Email Address

Do you consent to your Adviser having online access to your reports Yes No

Do you consent to us discussing your SMSF with your Adviser? Yes No



www.smsfai.com.au

Level 24, 91 King William Street,
Adelaide SA 5000

service@smsfai.com.au
linkedin.com/company/smsfai/