



# SMSF Limited Recourse Borrowing Arrangement Order Form

Name	<input type="text"/>	Phone	<input type="text"/>
Firm	<input type="text"/>	E-mail	<input type="text"/>

## SMSF Details

**IMPORTANT: Full, verifiable names are required.**

**SMSF Name**

**SMSF Trustee Names**  
(include ACN if Company)

**Officer Names and Roles**  
(First Officer listed to be Chairman, first 2 Officers to be signatories)

<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary

**Member Name**

**Member Name**

**Member Name**

**Member Name**

**Meeting Address**

Please submit a copy of the original trust deed (and any documents that have amended it) together with this order form.

## Custodian Trust Details

**IMPORTANT: Full, verifiable names are required.**

**Trust Name**

**Trustee Names**  
(include ACN if Company)

**Officer Names and Roles**  
(First Officer listed to be Chairman, first 2 Officers to be signatories)

<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary
<input type="text"/>	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary

**Meeting Address**

## Asset Description

Please provide a full description of the asset being acquired including real property description in the case of land.

**Address**

<b>Real Property Description</b>	<input type="text"/>	<b>Title Reference/ Folio Identifier</b>	<input type="text"/>
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Is the borrowing being sourced from a bank or other institutional lender?  YES  NO

(If YES) Name of Bank /Institution

Please return this completed form to [acis@acis.net.au](mailto:acis@acis.net.au), Freefax 1800 655 556 or Locked Bag 1, Fortitude Valley Q 4006

# SMSF Limited Recourse Borrowing Arrangement Order Form



**IMPORTANT:** Please complete the following only if the borrowing is self funded - do not complete if funding sourced is a bank or lending institution.

## Lender Details

Lender Names  
(include ACN if Company)

  

(include Trust and Trustee details if applicable)

Officer Names  
and Roles  
(First Officer listed to be  
Chairman, first 2 Officers  
to be signatories)

  
  
  

Director  Secretary

Director  Secretary

Director  Secretary

Director  Secretary

Meeting Address

## Loan Details

Loan Amount (\$)

Term

If a loan constitutes a Div 7A loan then the applicable term will be the lesser of the maximum period available under Div 7A and the terms stipulated by you.

Interest Rate

If the loan constitutes a Div 7A loan then the applicable interest rate will be the higher of the rate stipulated by you and the rate applicable from time to time under Div 7A. The interest rate may be linked to actual funding costs rather than a set rate and may be fixed or variable.

Loan Security

Please provide a FULL description of the security to be given securing the loan including a description of the property or assets.

  

## Additional Information/Special Instructions

  
  
  

**IMPORTANT NOTE:** We do not provide advice in relation to superannuation matters, superannuation borrowings, instalment warrants or any stamp duty or other state or territory taxes nor in respect of any other matter. Please note that superannuation laws and practice, taxation laws and practice, trust laws and stamp duty laws are continually changing. Professional advice should be obtained before signing any documents. Significant fees, duties and penalties can be imposed when entering into arrangements of this type. You must satisfy yourself that the documents comply with the relevant legislation and the law regarding arrangements of this type particularly the Superannuation Industry (Supervision) Act 1993 and Regulations. Accordingly, except to the extent required by law, we do not accept any responsibility other than in relation to the provision of the documents in accordance with your instructions.

## Payment Details

Please debit the following card details by the amount of \$

Type of Card

Visa  Mastercard  Diners Club\*  Amex\*

\*3% SURCHARGE APPLIES

Card Number

  

Expires

  

CCV

  

Name on Card

  

Signature

  

Please return this completed form to [acis@acis.net.au](mailto:acis@acis.net.au), Freefax 1800 655 556 or Locked Bag 1, Fortitude Valley Q 4006

# SMSF Limited Recourse Borrowing Arrangement Order Form



## SMSF Limited Recourse Borrowing Arrangement "LRBA" Structure

Under the Acis standard LRBA documentation, the SMSF borrows directly from the nominated lender and invests the borrowed funds and any additional amount to be contributed by the SMSF in the asset which is held by a custodian trustee.

If you require a non-standard LRBA structure, please contact us to discuss prior to ordering.

### Do you require:

(Please select)

- Custodian Trust Deed
- New company for corporate custodian trustee (recommended)  
*Please attach a completed Company Registration Order Form*
- SMSF Deed Upgrade (recommended)  
*Please attach a completed SMSF Deed Upgrade Order Form*
- New SMSF Trust Deed  
*Please attach a completed SMSF Order Form*

## COMPLETE BELOW ONLY IF SELF FUNDED AND YOU HAVE COMPLETED PAGE 2

- Loan Agreement  
*Please complete the Loan Agreement details*
- Mortgage  
*Please complete the Loan Security details*

## Acis SMSF LRBA – Standard Fees and Charges

SMSF CUSTODIAN TRUST WITH LOAN AGREEMENT AND MORTGAGE	\$1650.00 GST inc.
SMSF CUSTODIAN TRUST WITH LOAN AGREEMENT	\$1100.00 GST inc.
SMSF CUSTODIAN TRUST ONLY	\$550.00 GST inc.

**These fees exclude new corporate custodian trustee, new SMSF trust deed, SMSF deed upgrade or security documents where required. Please contact Acis for a quote prior to ordering.**

**IMPORTANT NOTE:** The above fees and charges do not include additional out of pocket expenses required for the completion of the transaction documents. For example, stamp duties and registration fees will be payable in all jurisdictions in relation to any loan or security documentation and are not included in these fees.