

HOW TO SET UP A SELF MANAGED SUPER FUND ACCOUNT WITH BAPLINK

1. Complete Baplink Account Application Form
The name of the account should be the exact name of the Superannuation Fund.
The form can be found here>>><http://www.baplink.org.au>
2. Complete Baplink Identification requirements
Every Trustee will need to complete the Baplink Identification requirements
The form can be found here: <http://www.baplink.org.au>
3. Provide us with a Certified Copy of the Trust Deed
You must provide Baplink with a Certified Copy of the Trust Deed-we specifically need the Title Page, the Trustee/s (and Trustee Declarations), Schedule (Execution), Witnesses. This can be Certified by a Justice of the Peace or a Commissioner for Declarations.
4. Provide us with the TFN and ABN of the Superannuation Fund
We require the Tax File Number (TFN) and Australian Business Number (ABN) of your Self Managed Superannuation Fund.
5. Provide us with a Bank Statement of the Superannuation Fund with your External Bank Account
We require a copy of a Bank Statement of the Super Fund for our records, so that we can ascertain that we won't be making a third party payment.
6. If a Company is acting as Trustee.
If a Company is acting as Trustee we require a Certified copy of a Certificate of Company Registration.

Please note that we may be required to complete a Company name search.
If this is necessary you will be notified by Baplink and the fee will be debited to your account.

If you have any queries regarding this, please do not hesitate to contact the Baplink office.



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