

## NEW CLIENT DETAILS – SUPERANNUATION FUND

|   |  |
|---|--|
| Superfund Name  |  |
| Australian Business Number (ABN)  |  |
| Tax File Number (TFN)   |  |
| Trustee Name  |  |
| Postal Address  |  |
| Contact Person's Name   |  |
| Telephone Number  |  |
| Fax Number  |  |
| Mobile Number   |  |
| Email Address   |  |
| <p>Trustee company Director details</p> <p><i>If the superfund has a corporate trustee, for directors who are not clients of Catalyst Financial directly, please provide their names and Director ID (if they have one)</i></p> | <p>Director name:</p> <p>Director ID:    DIR 036 _ _ _ _ _</p><br><p>Director name:</p> <p>Director ID:    DIR 036 _ _ _ _ _</p><br><p>Director name:</p> <p>Director ID:    DIR 036 _ _ _ _ _</p><br><p>Director name:</p> <p>Director ID:    DIR 036 _ _ _ _ _</p> |
| Current Accountant's Name   |  |
| Current Accountant's Business Name  |  |
| Current Accountant's Postal Address   |  |
| Current Accountant's Email Address  |  |

Catalyst Financial Pty Ltd - Strategic Accountants

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## DOCUMENTS TO PROVIDE

1. Copy of the signed superannuation fund deed
2. Copy of the latest superannuation fund's investment strategy
3. Copy of latest audited financial statements and income tax return
4. Detailed unrealised capital gains report, showing full investment purchase history
5. Copy of ATO SMSF trustee declarations

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