



prosuper

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### SMSF Limited Recourse Borrowing Arrangement (LRBA) Order Form

NAME:

FIRM:

PHONE:

E-MAIL:

#### SMSF DETAILS

SMSF Name

SMSF Trustee Name/s  
*(include ACN if Company)*

SMSF Trustee Address

Names of ALL Directors  
*(1st 2 listed to be signatories)*

Names of ALL SMSF Members  
*(Fund members)*

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

#### BARE TRUST DETAILS

Bare Trust Name

Bare Trustee Name

ACN

Bare Trustee Address

Names of ALL Directors  
*(1st listed to be Chairman)*  
*(1st 2 listed to be signatories)*

#### INVESTMENT DETAILS

ASSET DESCRIPTION – Please provide a full description of the asset being acquired as the investment including real property description in the case of land.

Title Reference

Real Property Description

County

Parish

IS THE BORROWING BEING SOURCED FROM A BANK OR OTHER INSTITUTIONAL LENDER?

YES

NO

*(If YES) Name of Bank / Institution*

**PAYMENT DETAILS IF PAYING BY CREDIT CARD:** Please debit the following credit card by the amount of \$

TYPE OF CARD:      Visa                      MasterCard

EXPIRY:

CARD NUMBER:

SIGNATURE:

NAME ON CARD:

Please return this form by email to [prosuper@prosuper.com.au](mailto:prosuper@prosuper.com.au) or call 1800 641 146 with any queries.

DO NOT COMPLETE IF FUNDING SOURCE IS A BANK OR LENDING INSTITUTION.  
PLEASE **COMPLETE** THE FOLLOWING **ONLY IF THE BORROWING IS SELF FUNDED**

*These details are only required if loans are to be obtained from persons or companies who do not have standard loan documentation. For example where a party related to the SMSF makes a loan for the asset acquisition.*

## LENDER

**Lender's Name**

*(include ACN if Company)*

**Street Address**

**Names of ALL Directors**

*(1<sup>st</sup> listed to be Chairman)*

*(1<sup>st</sup> 2 listed to be signatories)*

## 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)

**IMPORTANT NOTE:** Pro-Super does 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.

**Please return this form by email to [prosuper@prosuper.com.au](mailto:prosuper@prosuper.com.au) or call 1800 641 146 with any queries.**