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SMSF Limited Recourse Borrowing Arrangement (LRBA) Order Form

NAME:

FIRM:

PHONE:

E-MAIL:

Please select the LRBA products you would like to order:

LRBA Custodian Trust (p1)

Loan Agreement (p2)

Mortgage (p2)

SMSF DETAILS

SMSF Name:

SMSF Corporate Trustee:

(if applicable)

A.C.N.

Company Secretary:

Names of ALL
Directors/
Individual
Trustees:
(First 2 listed to
be signatories)

1.
2.
3.
1.
2.
3.

4.
5.
6.
4.
5.
6.

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

LRBA TRUST DETAILS

LRBA Trust Name:

LRBA Corporate Trustee:

A.C.N.

Company Secretary:

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

1.
2.
3.

4.
5.
6.

Meeting Address:

INVESTMENT DETAILS

ASSET DESCRIPTION - Please provide a full description of the asset being acquired as the investment.
In the case of property, include the address, the real property description and if possible, email a copy of the contract with the order form.

Street Address:

Title Reference/Real Property Description:

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

YES

NO

(If YES) Name of Bank / Institution

