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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

LOAN AGREEMENT AND MORTGAGE DETAILS

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)

A.C.N.

(if applicable)

Street Address:

(If company use

Registered Office address

Names of ALL

Directors:

1.

4.

*(1st listed to
be Chairman)*

2.

5.

*(1st 2 listed to
be signatories)*

3.

6.

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.

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

TYPE OF CARD: Visa MasterCard

CARD NUMBER:

EXPIRY:

NAME ON CARD:

SIGNATURE: