



Order Form – Convert Company Type

Firm/ Person taking the order

Firm Name: Contact Name:

Delivery Address (no PO boxes):

Suburb: State: Postcode:

Phone: Email:

Please select from the below lodgement options

Convert to/ from a Superannuation Trustee Company: Online (\$200.00) Paper (\$220.00)

Converting from a Home Unit Company : Online \$400 Paper (\$420.00)

Company Details

Company Name:

ACN:

Registered Office:

Date of Members Meeting:

First Members Name:
Authorised Representative (if Shareholder is a Company)

Second Members Name:
Authorised Representative (if Shareholder is a Company)

Names of any other members (if any):

How Payment will be made

Direct Deposit: BSB: 065-115 Acct: 10414902 (use proposed Company name as reference)

Cheque (Must be cleared before processing and made payable to XYZ Accounting)

Credit Card Number: Expiry Date:

Card Holder Name: CVV:

Type of Card: MasterCard Visa Amex (NB: Amex will incur 3.03% inc GST fee)

Signature:

Date of order:



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IMPORTANT INFORMATION

1. NO LEGAL, FINANCIAL OR TAX ADVICE

We do not provide legal, financial or taxation advice and therefore take no responsibility for these matters. You should consult your lawyer, financial advisor or accountant before placing an order with us.

2. NAME ON TAX INVOICE

Please note that you are our client and tax invoices are in your name and it is you we extend credit to, not your client. We cannot and will not alter the tax invoice from you to your client after your order has been processed. Should you want the tax invoice in the name of your client please advise us beforehand so it is not on your account. We shall require cleared funds in payment prior to processing your order as we do not extend credit to clients of our clients. The name on the tax invoice determines the debtor.

3. TERMS OF TRADE

We extend thirty days terms of trade to practising solicitors, financial planners and accountants but not to their clients. We require cleared funds from private clients before we process the order. See 2 above re name on Tax Invoice. Where accounts are paid after the time of order using credit card, we charge an admin fee of 2.5% (incl. GST) on Visa and MasterCard and 3.03% (incl. GST) on Amex.

Whilst most of our clients observe the 30 days terms of trade we extend, please be aware it is company policy to suspend further credit at 45 days.

4. TERMS OF TRADE

We require cleared funds from private clients before we process the order. American Express (subject to surcharge of 3.03% incl. GST), MasterCard and Visa (not subject to surcharges) accepted. Non-bank cheques are accepted but need to be cleared before the order is processed which may take four business days.