

## BARE TRUST SET UP CHECKLIST

Outlined below is a checklist of the information needed to complete a Bare Trust application.

### TRUST DETAILS

---

- Desired name of Trust
- State of jurisdiction
- Lending bank (NAB or Other)
- Name of related Superannuation Fund

### BARE TRUST TRUSTEE DETAILS

---

- Full Name
- Address
- A.C.N. if company

### EXISTING SUPERANNUATION FUND MEMBER DETAILS

---

- Full name
- Residential address

### EXISTING SUPERANNUATION FUND TRUSTEE DETAILS

---

- Full Name
- Address
- A.C.N. if company