



- Whether the lender is acting on behalf of a trust, or as trustee/s of a trust.
  - if yes, the name of the trust.

## Loan details

- Details of the loan including:
  - the amount of money the lender is lending the borrower,
  - the length of the loan – in years and months,
  - the settlement date,
  - whether the loan will be drawn down once or more than once,
  - the date the final repayment of principal and interest will be due,
  - the method of payment the borrower will be required to use,
  - the interest rate the borrower is to pay,
  - whether either parties are able to vary the interest rate by agreement,
  - whether there will be a period when the borrower is required to only pay interest and not the principal,
  - frequency of repayments of the interest, and
  - frequency of principal repayments.

## Custodian details

- Whether the custodian is a company or one or more individuals:
  - if the custodian is a company, then confirm the following:
    - company name,
    - ACN,
    - address, and
    - whether it will execute the trust by affixing its common seal.
  - if the custodian is one or more individuals, then confirm the following for each:
    - full name, and
    - address.

## Asset

- The type of asset the trustee(s) are acquiring for the SMSF through the limited recourse borrowing arrangement.
- Asset's identifying details.

### Notes

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### Notes

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## Additional Legal Services from Maddocks

- Would you like Maddocks to contact you regarding the additional legal advice required to use the limited recourse borrowing arrangement package?

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