

Timeline – Establishment Process for your SMSF

Please find below a step by step guide of the establishment process for your SMSF.

Items to be established	Timeline (as a guide only)	Process
ANZ V2 Plus Bank Account	<p>1 – 2 weeks</p> <p>From returning the signed SMSF documentation to our office.</p>	<p>ANZ will forward to you directly your SMSF ANZ V2 Bank details including login and passwords.</p>
CommSec Share Trading Account	<p>2 – 3 weeks</p> <p>From returning the signed SMSF documentation to our office.</p>	<p>CommSec will forward to you the CHESS holding number (HIN) for your SMSF Share Trading Account 2 – 3 weeks from returning the signed SMSF documentation to our office.</p> <p>ESUPERFUND will forward to you the CommSec Account Number in the Welcome package on completion of the SMSF process.</p>
Trustee(s) Role and Responsibilities (ATO Documentation)	<p>3 – 4 weeks</p> <p>From returning the signed SMSF documentation to our office.</p>	<p>The Australian Taxation Office (ATO) will forward to the Trustees the “Roles and Responsibilities as a Trustee” of a SMSF.</p>
Welcome Package	<p>4 - 6 weeks</p> <p>From returning the signed SMSF documentation to our office.</p>	<p>ESUPERFUND will forward to you a welcome package on completion of the SMSF establishment process. The documentation will include the following:</p> <ol style="list-style-type: none"> 1. CommSec account number and information about your CommSec Share Trading Account. 2. The ABN and TFN registration Notices for your SMSF. 3. Documentation on how to Rollover your existing Superannuation Fund. 4. An Employee Standard Choice Form is included in the Welcome package to enable your SMSF to receive employer Super Contributions.