



## Marcus Today SMA | SMSF | Investor Details Form

To invest into the Marcus Today SMA within your Self Managed Super Fund, complete the following information sheet, and return it along with a copy of SMSF Trust Deed and 100 points of personal identification (all documents are required to be certified).

Individual 1: Given Name(s) & Salutation				
Individual 1: Surname				
Individual 1: Date of Birth				
Individual 2: Given Name(s) & Salutation				
Individual 2: Surname				
Individual 2: Date of Birth				
Super Fund name (as per Trust Deed)				
Super Fund ABN				
Super Fund TFN				
Trustee name				
Trustee ACN (if applicable)				
Residential Address				
Postal Address				
Contact Number – Home				
Contact Number – Mobile				
Email				
Marcus Today SMA Model	<input type="checkbox"/> Marcus Today SMA (Growth SMA)	<input type="checkbox"/> Marcus Today Equity Income SMA		
Initial investment amount (\$50,000 minimum)	\$	\$		
Reinvest dividends within SMA model or pay to nominated bank account?	<input type="checkbox"/> Reinvest	<input type="checkbox"/> Paid Out	<input type="checkbox"/> Reinvest	<input type="checkbox"/> Paid Out
Initial investment made via Direct Debit or Bpay?	Direct Debit / BPay			
Regular investment amount (if applicable)	\$			
Nominated external bank account (mandatory)	Account Name: BSB: Account Number:			

*The service you have requested is Execution Only. By sending us this form, you acknowledge that your personal circumstances and financial situation have not been taken into consideration. You only seek assistance in investing into the Marcus Today SMA in accordance to the above completed Applicant Details.*

*Return the completed form along with ID documentation to [sma@marcustoday.com.au](mailto:sma@marcustoday.com.au) or fax to (03) 9867 2131*