



APPLICATION TO OPEN A TRUST/SMSF ACCOUNT

Name of Trust/SMSF

Print Name*: _____ ABN: _____

LEI Number: _____

Name of Trustee(s)

Sole Trustee/ Trustee 1 (Print Name)*: _____

Trustee 2 (Print Name): _____

Trust Deed

Print Name of Parties and date*: _____

Resolution of Trustee(s)

The Trustee(s) having satisfied his/her/themselves that the Trustee(s) under the Trust Deed is/are permitted to do so, certify that:

1. Each of the Trustees has reviewed and considered the risks associated with the financial products offered;
2. Each of the Trustees approves the transactions contemplated by completion of this Account Application and agrees to be governed by the associated legal documents;
3. This Application Form has been properly executed by the applicant;
4. Each of the Trustees authorises one or more of the Trustees to sign any document in connection with the operation of the Account and to give any oral or written instruction in relation to the Account including, but not limited to, instructions to enter into transactions on behalf of the applicant;
5. There is no legal or other reason why the Trust should not conduct business in the financial products offered.

Trustee 1 (Print Name)*:

Signature (Sole Trustee/Trustee 1*):

_____ **Date:** _____

Trustee 2 (Print Name)*:

Signature (Trustee 2*):

_____ **Date:** _____



Trustee Contact Information

Contact Name*: _____

Telephone Number*: _____

Email Address*: _____

Identification of Sole Trustee/Trustee 1

We will verify a Trustee's identity before trading can occur on the account. To do this we will use a combination of electronic identification methods and documents where necessary.

Full Name*: _____

Residential Address*: _____

Postcode*: _____

Date of Birth*: _____

Email address*: _____

Contact Phone number*: _____

Identification of Trustee 2

Full Name: _____

Residential Address: _____

Postcode: _____

Date of Birth: _____

Email address: _____

Contact Phone number: _____

Supporting Documentation

Trustees' identities will be verified electronically where possible but may require further documentation.

Declarations *

Please mark with a cross to acknowledge each declaration.

- I understand the agreement I am entering into with Finsa Pty Limited - (ACN: 158 065 635) (TradeDirect365 is a trading name thereof). I confirm that I have read, understood and agree with the Client Agreement, the Financial Services Guide, and the Product Disclosure Statement.
- I understand the nature and risks associated with trading CFDs. I confirm that I have read, understood and agree with the Risk Warning Notice and other Legal Notices .
- I understand I am consenting to Finsa Pty Limited (TradeDirect365 is a trading name thereof) using my name, address and date of birth to verify my identity electronically with a credit reporting agency and obtaining an assessment of whether this matches information on my credit information file.
- I consent to Finsa Pty Limited paying third parties for marketing, client acquisition and support services up to 50% of Spread Revenue derived from my trading activity with Tradedirect365. Spread Revenue is calculated by multiplying the difference between the offer and bid price of the market by the volume of the trade, eg a 10 contract trade on an Australia 200 Index quote of 5200-5201 would equate to \$10 in Spread Revenue (10 Contracts X 1 Spread Difference) The fee is taken out of the commission or spread charged and does not impact my trading costs.

Signature (Sole Trustee/Trustee 1)

_____ Date: _____

Signature (Trustee 2)

_____ Date: _____

Once completed, please scan and email your completed application form and the supporting documents to support@TradeDirect365.com.au

Please ensure you have also attached the following:

- A copy of the Trust Deed
- A copy of a recent Trust bank statement (within the last 90 days)