
SelfWealth[®]

SelfWealth Ltd

SelfWealth TRADING Application Guide

How to complete your SelfWealth TRADING application:

Step 1 – Establish the appropriate applicant type, the following types are supported

- Individual
- Joint
- Company
- SMSF (individual & corporate)
- Trust (non-corporate or corporate)

NOTE: All applicants must be tax residents of Australia. SelfWealth does not support foreign tax entities or residents.

Step 2 – Complete the application form

Please enter your details online in the application form, enabling creation of your trading account and cash account. Once completed please check all sections are correct, then sign using the PIN number sent to the email address entered in your application.

Account names and designations for different types of investors:

Investor Type	Account Type	Account Name	Account Designation	Who Signs
Individual Applicant	Individual	Use given names. Do not use initials	N/A	Individual Investor. If you are signing under Power of Attorney, please attached a certified copy of the POA
Joint Applicant	Joint	Use given names. Do not use initials	Optional	Both investors. If you are signing under Power of Attorney, please attached a certified copy of the POA
Company	Company	Use name of Company, registered with ASIC	Citizen Pty Ltd	Two Officers; OR As required by the Constitution or rules of the company; OR one Director for a Sole Director Company
SMSF	Trust - SMSF	Use the name of the Trustee(s) then the name of the Fund	Mr John Citizen & Mrs Norma Citizen (Superannuation A/C)	All Trustees
Trusts	Trust	Use the Trustee(s) personal names, then the name of the trust/beneficiary	Mr Norma Citizen (Baby Citizen A/C)	All Trustees

Individual

- To be 18 years of age or older
- Personal details, date of birth, current Australian residential and postal address
- Email address, mobile number
- Your TFN or exemption code (optional)
- Drivers licence or equivalent photo ID

Joint

- To be 18 years of age or older
- Personal details, date of birth, current Australian residential and postal address
- Email address, mobile number
- Your TFN or exemption code (optional)
- Drivers licence or equivalent photo ID

Individual Trust/SMSF

- Personal Details for all applicants: date of birth, current Australian residential & postal address, email address and mobile number
- Trust details consistent with the trust deed
- TFN or exemption code (optional)
- Original photocopy of the Trust Deed extract (if applicable)

Corporate Trust/SMSF

- Each member of the fund must be a director of the company, and each director of the corporate trustee must be a member of the fund
- Personal Details for all applicants: date of birth, current Australian residential & postal address, email address and mobile number
- Trust details consistent with the trust deed
- TFN or exemption code (optional)
- Original photocopy of the Trust Deed extract (if applicable)

Company

- A valid Australian Company Number (ACN)
- To be 18 years of age or older (ALL applicants)
- Personal details for all applicants inc DOB and any additional beneficial owners or controllers
- Current Australian residential and postal address for of all applicants
- Email address, mobile number