

Switching your SMSF to us: 5 easy steps

TELL US ABOUT YOU

1



After you've entered your contact details, we'll call you to explain the process.



You'll fill out our online form to give us the go-ahead.

WE'LL SET UP YOUR SMSF

2

Transfer

EXISTING

SMSF

We'll transfer your existing SMSF and set up your Bell Direct trading account.



You'll receive our SMSF Welcome Pack.

TOGETHER WE'LL TAKE CARE OF THE PAPERWORK

3



Sign and return all the documents to us.



If you don't already have a Macquarie bank account, you'll receive an application to open one for your SMSF.

YOUR ACCOUNTS WILL BE ACTIVATED

4



You'll get login details for all your newly activated accounts.



After your first transaction, we'll send you a letter with access to your fund documents and any outstanding fees.



You'll get access to your SMSF online reporting to track your performance.

START INVESTING

5



Deposit funds in your Bell Direct trading account and start investing.