

# NAB CASH MANAGER ACCOUNT (CMA) INTEGRATION

Easily establish your SMSF and a NAB Cash Manager Account (CMA) using the one online form with Topdocs!

When you order an SMSF with Topdocs, you can now have a NAB *Cash Manager Account* (CMA) application form pre-populated for you **at the same time**

In the same order form you can also:

- register a corporate trustee for the Fund;
- have your ABN application prepared **free of charge**; and
- order an investment strategy for the Fund



## My Document Portal

### New Order Details

Enter your reference for this order:

My SMSF

Type of service for this order: ?

Full Service - \$374.00

Instant Email Delivery - \$234.00

### Order Additional Documents at the same time

You can order multiple documents using this one form. Select additional documents to order below:

#### Available Additional Documents to Order

ABN and TFN Registration for the Super Fund  
Register a Company to act as Trustee of the SMSF  
Investment Strategy for the Super Fund

Select

☐

☐

☐

#### Instant Email Price

\$0.00

\$587.00

\$55.00

Total Order Amount: \$234.00

### Create a Cash Management Account application for your SMSF

Establish a NAB Cash Manager Account

This option pre-fills your NAB CMA pdf application form

[Download & View the NAB CMA T&Cs including NAB's Privacy notice](#)

[View the Integration Brochure](#) | [Read more about the NAB CMA](#)



\$0.00

Your online order form will ask you all the required questions to set up your documents, and to pre-populate the NAB CMA application and NAB identification forms



## My Document Portal

### Order No.(43088) My SMSF - SMSF Establishment

Exit without Saving

Fund Details

Member Details

Trustee Details

NAB CMA

Summary

Save and Edit

Finish and Purchase

### NAB Cash Manager Account Details

Details of the Financial Adviser setting up the NAB Cash Manager Account for the Fund

Financial Adviser Name

Financial Adviser's Company Name

Once you have submitted your order with Topdocs, your SMSF documents will be prepared and either emailed to you instantly, or express posted to you, depending on your selection

As part of your documentation package, you will also receive:

- A pre-populated NAB CMA application form (in editable pdf)
- Pre-populated identification forms
- Instructions on how to lodge your NAB CMA application form\*



IDENTIFICATION FORM  
INDIVIDUALS & SOLE TRADERS

USE TO COMPLETE THIS FORM

1. Complete the form for yourself. Complete the form for yourself or for a sole trader. Complete the form for yourself or for a sole trader.

SECTION 1 - PERSONAL DETAILS

Full Name (Surname, First Name, Middle Name)

Residential Address (Post Box is NOT acceptable)

State

Suburb

Postcode

Country

DATE OF BIRTH (DD/MM/YYYY)

COMPLETE THIS PART IF INDIVIDUAL OR A SOLE TRADER

Full Business Name (if any)

Business Address (if any) (Post Box is NOT acceptable)

State

Suburb

Postcode

Country

SECTION 2 - FINANCIAL INFORMATION FOR FOREIGN ACCOUNT TAX COMPLIANCE ACTS

Is this individual a US citizen or resident of the US for tax purposes?

Yes ☐ No ☐ If yes, please provide the individual's US Taxpayer Identification Number (TIN)

SECTION 3 - RESIDENTIAL INFORMATION

Are you currently residing in Australia or New Zealand?

Yes ☐ No ☐ If no, please provide the individual's current residential address (if any)

SECTION 4 - FINANCIAL INFORMATION FOR FOREIGN ACCOUNT TAX COMPLIANCE ACTS

Are you currently residing in Australia or New Zealand?

Yes ☐ No ☐ If no, please provide the individual's current residential address (if any)

SECTION 5 - FINANCIAL INFORMATION FOR FOREIGN ACCOUNT TAX COMPLIANCE ACTS

Are you currently residing in Australia or New Zealand?

Yes ☐ No ☐ If no, please provide the individual's current residential address (if any)

\*We note only Financial Advisers can lodge this form with the NAB. SMSF Trustees should contact NAB directly on 13 22 65 to establish their CMA.