

NAB CASH MANAGER ACCOUNT (CMA) INTEGRATION

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

When you order an Discretionary or Unit Trust 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; and
- have the trust deed stamped electronically with the State Revenue Office (VIC only)

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

Once you have submitted your order with Topdocs, your Trust documents will be prepared and either emailed to you instantly, or couriered to you the next day, 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*

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