



Fellow Membership Application Guidelines

FELLOW MEMBER ELIGIBILITY CRITERIA

In order to be eligible for Fellow Member status, you will need to meet the following criteria:

1. Be an SMSF Association Specialist Member with a minimum of 15 years of continuous membership
2. Demonstrate leadership in the SMSF industry/sector as evidenced by employment responsibilities and contribution to the industry/sector. Examples of activities that may demonstrate leadership include:
 - a. Managing a team of 10 or more people
 - b. Providing a mentor role to other advisers
 - c. Presenting on SMSFs at conferences or educational seminars
 - d. Participating on Boards or Committees
3. Be a fit and proper person with an exemplary membership record regarding your conduct

Fellow Membership is a sub-category of Specialist Membership and as such the annual cost of Fellow Membership will be that of Specialist Membership (i.e. no additional cost).

APPLICATION FOR FELLOW MEMBER STATUS

In order to be considered for Fellow Member status, those Members meeting the eligibility criteria must complete and submit the following documents:

1. Fellow Member Application Form
2. Two letters of reference from individuals that know you in a professional capacity, providing evidence to support compliance with item 2 above (Fellow Member Eligibility Criteria).

Completed applications must be forwarded to memberservices@smsfassociation.com in PDF format. If you require assistance, please contact the membership team on 08 8205 1900 or via [email](#).

Applications may be submitted throughout the year.

APPROVAL OF APPLICATIONS

Final approval of Fellow Member applications will be completed by the SMSF Association Board.

Important note: Submission of your Fellow Application and supporting letters of reference does not constitute automatic acceptance of your application.

ANNOUNCEMENT OF FELLOW MEMBERS

Fellow Members will be notified of their successful application once approval has been provided by the Board. Recognition as a Fellow Member will commence from this date.

Formal recognition of all Fellow Members will occur each year at a formal celebration.



Fellow Membership Application form

YOUR DETAILS

Member Number

Full Name

Company Name

Postal Address

Preferred Phone Number

Email Address

YOUR CURRENT EMPLOYMENT RESPONSIBILITIES

SYNOPSIS OF YOUR SMSF RELATED ROLES

YOUR CONTRIBUTION TO THE SMSF INDUSTRY/SECTOR



Fellow Membership Application form

REFEREE DETAILS

Please note that Referees must be individuals that you know in a professional capacity.
Written references from each Referee must be submitted with your application form.

Referee 1

Full Name

Relationship to Applicant

Preferred Phone Number

Email Address

Referee 2

Full Name

Relationship to Applicant

Preferred Phone Number

Email Address

I declare that I meet the eligibility criteria for Fellow Membership and all information supplied in this application is true and correct.

I have attached written references from my nominated referees.

Signature

Date