



# 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](mailto: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