

SMSF Change of Trustee

Contact Details:

Advisor Name:

Advisor Company:

Postal Address:

Phone: Email:

Payment Details:

Enclosed is payment for an SMSF Change of Trustee for \$275.00

Direct Deposit* Cheque

Account name: Super Registry Pty Ltd
Account details: Macquarie Bank
BSB: 183-334
Account: 122 641 285

**If you are paying via direct deposit please use the Fund name as the transaction reference*

Fund Details:

Name of Fund:

Registered address of fund:

Trustee Meeting Address:

Establishment Date: / /

Trust Deed variation dates: / / , / / , / / , / /

ABN of the Fund: - - -

State law governing the Fund:

Trustee Details:

Current Trustee Type: Individuals Company

New Trustee Type: Individuals Company

Will you be removing any Members from the Fund during the Trustee change? YES NO

Will you be admitting any new Members from the Fund during the Trustee change? YES NO

Current Trustee Details (where a Corporate Trustee):

Company name:

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ACN:

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Registered address:

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Company Chairman:

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Current Individual Trustee / Corporate Trustee Director Details:

Trustee/Director 1

Title: Full name:

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Address:

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Date of Birth:

/ /

Gender:

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Tax File Number:

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Is this person an Individual Trustee **or** a Director of the Corporate Trustee? INDIVIDUAL TRUSTEE DIRECTOR

Is this person a member of the Fund? YES NO

Trustee/Director 2

Title: Full name:

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Address:

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Date of Birth:

/ /

Gender:

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Tax File Number:

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Is this person an Individual Trustee **or** a Director of the Corporate Trustee? INDIVIDUAL TRUSTEE DIRECTOR

Is this person a member of the Fund? YES NO

Trustee/Director 3

Title: Full name:

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Address:

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Date of Birth:

/ /

Gender:

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Tax File Number:

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Is this person an Individual Trustee **or** a Director of the Corporate Trustee? INDIVIDUAL TRUSTEE DIRECTOR

Is this person a member of the Fund? YES NO

Tax Office Questions:

Answer the following if the new Trustees are individuals:

- Does the Fund have an individual Trustee who is a legal person representative, or a Parent or guardian acting on behalf of a member under a legal disability? YES NO
- Have any of the Trustees been convicted of an offence in respect of dishonest conduct in the Commonwealth or any state, territory or foreign country? YES NO
- Has a civil order penalty ever been made in relation to any of the Trustees? YES NO
- Are any of the Trustees an undischarged bankrupt? YES NO
- Have any of the Trustees been notified that they are a disqualified person by a regulator (APRA or the Commissioner of Taxation)? YES NO
- Does the Fund intend to be a self managed superannuation fund for 12 months or longer? YES NO

Answer the following if the new Trustee is a Company:

- Does the Fund have a corporate trustee which has a director who is a legal personal representative or a parent or guardian acting on behalf of a member under a legal disability? YES NO
- Does the company know or have reasonable grounds to suspect, that a person who is, or is acting as, a responsible officer of the body corporate is a disqualified person? in the Commonwealth or any state, territory or foreign country? YES NO
- Has a receiver, or a receiver and manager of the company been appointed? YES NO
- Has the company been placed under official management? YES NO
- Has a provisional liquidator of the company been appointed? YES NO
- Is the company being wound up? YES NO
- Does the Fund intend to be a self managed superannuation fund for 12 months or longer? YES NO

Please Fax or Email this completed form to Super Registry along with a copy of the Funds most recent Trust Deed:

Fax: (03) 8256 0108

Email: info@superregistry.com.au