

Instructions for SMSF Change of Trustee

WHEN TO USE THIS FORM

- Please use this form to add or remove an individual or corporate trustee and/or add or remove members of the fund
- Please use BLOCK LETTERS.

Name of Fund

ABN of Fund

ORDER PLACED BY: _____

(Please note documents and invoice will be directed to this person, unless otherwise stated)

Company Name

Address

Email

Phone

Fax

Authorised by: _____

Signature:

Question 1

Is the fund on SUPERCentral?

YES – Please provide

a. Date of signing SUPERCentral deed ___/___/___

b. Date of establishment of fund ___/___/___

NO – Please provide Full signed copy of the current deed and any deeds of amendment since its establishment

Question 2

Who is the existing trustee of the fund?

The trustees are **Individuals** – complete this part

T1	Full Name	
	Address	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

T2	Full Name	
	Address	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

T3	Full Name	
	Address	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

T4	Full Name	
	Address	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

The trustee is a **company** – complete this part

Company name	
ACN	
Address or Registered Office	

Please provide details of directors

D1	Full Name	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

D2	Full Name	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

D3	Full Name	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

D4	Full Name	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

Question 3

Do you want to remove one or more of the existing trustee(s)?

(note: removal of director of a corporate trustee is not a removal of existing trustee)

YES

I would like to remove the above corporate trustee. **Please now go to question 5.**

OR

I would like to remove individual trustees as ticked below. **Please now go to question 5.**

T1

T2

T3

T4

NO – go to question 4.

Question 4

Do you want to remove a member of the fund who is a director of the corporate trustee above?

YES

I would like to remove the ticked member who is a director of the corporate trustee above.

Please now go to question 5.

D1

D2

D3

D4

NO – go to question 5.

Question 5

Do you want to add new trustee(s)?

(note: if the existing trustee is a company and you wish to add new member and keep the same company then do not complete this section)

YES – complete next page

NO – go to question 5.

The new trustees are **Individuals** – complete this part

NT1	Full Name	
	Address	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>
		Will this person be admitted as a new member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

NT2	Full Name	
	Address	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>
		Will this person be admitted as a new member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

NT3	Full Name	
	Address	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>
		Will this person be admitted as a new member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

NT4	Full Name	
	Address	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>
		Will this person be admitted as a new member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

The new trustee is a **company** – complete this part

Company name	
ACN	
Address or Registered Office	

Please provide details of directors

ND1	Full Name	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

ND2	Full Name	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

ND3	Full Name	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

ND4	Full Name	
	Date of birth	Currently a member of the fund? Yes <input type="checkbox"/> No <input type="checkbox"/>

Question 6

Do you want to add member who is to be a director of the existing corporate trustee?

YES – provide details of new member/director

ND1	Full Name	
	Date of birth	

ND2	Full Name	
	Date of birth	

ND3	Full Name	
	Date of birth	

ND4	Full Name	
	Date of birth	

NO – there are no more questions to be answered.

APPLICABLE CHARGES

Fund Type	Type of Change	Our Fees (including GST but excluding delivery charges if any**)
SUPERCentral Fund	Change of trustee <u>without</u> new member/s being admitted	\$192.50
	Change of trustee <u>with</u> new member/s being admitted	\$302.50
Non-SUPERCentral Fund	Change of trustee <u>without</u> new member/s being admitted	\$385.00
	Change of trustee <u>with</u> new member/s being admitted	\$495.00

**Delivery charges include express post or courier charges. Please Note: no charges will apply for normal post or emails.

