

## 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.

