

# Superannuation Fund Deed Upgrade Order Form

Name	<input type="text"/>	Phone	<input type="text"/>
Firm	<input type="text"/>	Email	<input type="text"/>

## SMSF Details

NOTE: Full, verifiable name and address details are required.

Name of SMSF	<input type="text"/>		
Date of Original Deed	<input type="text"/>	Date of Last Amendment	<input type="text"/>
Names of ALL SMSF Members	<input type="text"/>		
	<input type="text"/>		
SMSF Address for Meeting	<input type="text"/>		

Please submit a copy of the original deed (and any documents that have amended it) together with this order form.

## Corporate Trustee

IMPORTANT: Full, verifiable name details are required.

Name	<input type="text"/>				
ACN	<input type="text"/>				
Officer Names and Roles	<input type="text"/>	<input type="checkbox"/>	Director	<input type="checkbox"/>	Secretary
First Officer listed to be Chairman, first 2 Officers to be signatories.	<input type="text"/>	<input type="checkbox"/>	Director	<input type="checkbox"/>	Secretary
	<input type="text"/>	<input type="checkbox"/>	Director	<input type="checkbox"/>	Secretary
	<input type="text"/>	<input type="checkbox"/>	Director	<input type="checkbox"/>	Secretary

## Individual Trustee/s

IMPORTANT: Full, verifiable name details are required.

Name	<input type="text"/>
Email	<input type="text"/>
Name	<input type="text"/>
Email	<input type="text"/>
Name	<input type="text"/>
Email	<input type="text"/>
Name	<input type="text"/>
Email	<input type="text"/>

## Principal Employer/Other Party

Name	<input type="text"/>				
	<input type="checkbox"/>	Principal Employer	<input type="checkbox"/>	Other (list type of role)	<input type="text"/>
Name	<input type="text"/>				
	<input type="checkbox"/>	Principal Employer	<input type="checkbox"/>	Other (list type of role)	<input type="text"/>

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Any member under a legal disability (e.g.- minors) must be represented by a Legal Representative "LPR". Please provide the full name of each LPR in the Additional Information section of this order.

## Additional Information/Special Instructions


## Payment Details

Please debit the following card details by the amount of \$

Type of card  Visa  Mastercard  Diners Club\*  Amex\* \* 3% surcharge applies

Card Number  Expires

Name on Card  Signature

## Completing this Order Form

### Self Managed Superannuation Funds

**Trustee/Member-** Generally, under the Superannuation Industry (Supervision) Act 1993:

- a) ALL fund members must be trustees (or directors of a corporate trustee) and ALL trustees (or directors of a corporate trustee) must be fund members;
- b) sole member funds without a corporate trustee must have at least 2 individual trustees one of whom is the sole member;
- c) an SMSF must not have more than 4 members.

**Legal Representative** If a member is a minor or otherwise incapacitated (infirm or mentally incapable), they must be represented by an individual trustee/director of a corporate trustee who is over 18 and having full legal capability.

**Other Roles-** Occasionally (and particularly in some older funds) a position such as a Founder, Guardian or Principal is incorporated into the fund's trust deed. These roles are generally no longer required and our Standard Governing Rules do not make reference to such roles. However, on some occasions, the trust deed may require the consent of the holder of such positions as a condition of amendment to the Governing Rules and therefore we require the relevant details to be provided.

**Principal Employer-** If the fund currently has a Principal Employer, please advise on page 1 of the order form. In some circumstances, superannuation fund trust deeds that were established with Principal Employers require the consent of the Principal Employer for amendments to be made to the deed. Should the previous trust deed have a Principal Employer listed, they may need to be party to any deed of amendment. If the Principal Employer listed in the previous deed no longer holds that position, please advise when submitting the order form.