

SMSF – CHANGE OF TRUSTEE

Please complete all details in block letters.

| | |
|--|--|
| Delivery of documents (electronic/hardcopy) | |
| Documents will be delivered electronically in PDF format. Alternatively, tick here to receive hardcopy documents (additional \$50 plus delivery costs) | <input type="checkbox"/> Hardcopy delivery |
| Name of SMSF | |

PERSON ORDERING

| | |
|--|------------|
| Firm Ordering (if applicable) | |
| Person ordering | |
| Tick here <input type="checkbox"/> if we are to invoice the fund's trustee (otherwise, our invoice will be made out to the person ordering). | |
| Street address | |
| Postal address, if different | |
| Phone | Fax |
| Email | |

REQUIRED DOCUMENTS

Please provide us with a copy of the current SMSF deed which is dated: _____ / _____ / _____

CURRENT TRUSTEE DETAILS

Please fill out the appropriate fields depending on whether the current trustee is a company or individuals.

| | | | |
|------------------------------------|---|-----------|--|
| COMPANY TRUSTEE | | | |
| Company Name | | | |
| ACN | - | - | |
| Registered Office | | | |
| Full names of all directors | | | |
| T1 | | T2 | |
| T3 | | T4 | |

OR:

| | | |
|----------------------------|----------------|--|
| INDIVIDUAL TRUSTEES | | |
| T1 | Full Name | |
| | Street Address | |
| T2 | Full Name | |
| | Street Address | |
| T3 | Full Name | |
| | Street Address | |
| T4 | Full Name | |
| | Street Address | |

PROPOSED TRUSTEE DETAILS

Please fill out the appropriate fields depending on whether the proposed trustee is a company or individuals.

| | | | |
|------------------------------------|--|--|------------------------------|
| COMPANY TRUSTEE | | If company ordered from DBA, tick here <input type="checkbox"/> (a company form should also be completed). | |
| Company Name | | | |
| ACN | | - - | |
| Registered Office | | | |
| Full names of all directors | | | |
| 1. | | T1? <input type="checkbox"/> | 2. |
| | | | T2? <input type="checkbox"/> |
| 3. | | T3? <input type="checkbox"/> | 4. |
| | | | T4? <input type="checkbox"/> |

OR:

| | | | |
|----------------------------|----------------|--|------------------------------|
| INDIVIDUAL TRUSTEES | | | |
| 1. | Full Name | | T1? <input type="checkbox"/> |
| | Street Address | | |
| 2. | Full Name | | T2? <input type="checkbox"/> |
| | Street Address | | |
| 3. | Full Name | | T3? <input type="checkbox"/> |
| | Street Address | | |
| 4. | Full Name | | T4? <input type="checkbox"/> |
| | Street Address | | |

MEMBERS

| | | | |
|-----------|----------------|--|------------------------------|
| 1. | Full Name | | T1? <input type="checkbox"/> |
| | Street Address | | |
| 2. | Full Name | | T2? <input type="checkbox"/> |
| | Street Address | | |
| 3. | Full Name | | T3? <input type="checkbox"/> |
| | Street Address | | |
| 4. | Full Name | | T4? <input type="checkbox"/> |
| | Street Address | | |

SMSF PRODUCTS: tick to order

- Free** **Newsletter**, SMSF technical updates and seminar news
- \$550 **The Complete Guide to SMSFs and Planning for Loss of Capacity and Death**, this 140+ page book details everything you need to know about SMSF succession planning. It is updated each August. Tick here to also receive the next updated version for an additional \$110 (payable upon receipt of updated version). For full terms and conditions, see www.dbalawyers.com.au/complete-guide
- \$440 **Investment Strategy Kit**
- \$150 **FY2012 SMSF Kit**, this kit provides an action list (with detailed commentary for each item) running you through all relevant SMSF issues to consider in the lead up to 30 June 2012. The action list includes contributions, pensions, overseas issues, death benefit nominations, issues related to the SMSF's investments, annual administration requirements and more. The kit includes a useful and practical tool that assists in calculating minimum pension amounts.
- \$150 **Trustee Compliance Kit**
- \$440 per pension **Pension Commencement Kits**
I want to start: ____ (insert 1, 2, 3, etc) Account-Based Pension(s)
or tick here if Transition to Retirement Income Stream
- \$220 **SMSF Borrowing Memo**

Please also see <http://www.dbalawyers.com.au/> for further information.

SPECIAL INSTRUCTIONS

Note that DBA is not licensed to provide financial product advice under the *Corporations Act 2001* (Cth).