

## UPDATE DEED OF A SMSF

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
	<input type="checkbox"/> If receiving hardcopy, tick here if you do not require a ring binder

<b>Name of Fund</b>	
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### INFO/DOCUMENTS

Please provide the following:

A copy of the current deed which is dated (dd/mm/yyyy):

\_\_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

A copy of any prior deeds, resolutions, notifications or consents that reflect a change in governing rules, changes of trustee, etc.

The date of the establishing deed of the fund (dd/mm/yyyy):

\_\_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

### PERSON ORDERING

<b>Firm Ordering (if applicable)</b>					
<b>Person ordering</b>					
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).					
<b>Street address</b>					
<b>Postal address, if different</b>					
<b>Phone</b>		<b>Fax</b>		<b>Email</b>	

### COMPANY OR INDIVIDUAL TRUSTEES

COMPANY TRUSTEE						
<b>Company Name</b>						
<b>ACN</b>	- - - - -					
<b>Registered Office</b>						
Full names of all directors						
<b>T1</b>				<b>T2</b>		
<b>T3</b>				<b>T4</b>		

OR

INDIVIDUAL TRUSTEES		
<b>T1</b>	Full Name	
	Street Address	
<b>T2</b>	Full Name	
	Street Address	
<b>T3</b>	Full Name	
	Street Address	
<b>T4</b>	Full Name	
	Street Address	

## MEMBERS

<b>M1</b>	Full Name		T1? <input type="checkbox"/>
	Street Address		
<b>M2</b>	Full Name		T2? <input type="checkbox"/>
	Street Address		
<b>M3</b>	Full Name		T3? <input type="checkbox"/>
	Street Address		
<b>M4</b>	Full Name		T4? <input type="checkbox"/>
	Street Address		

Note that any member employed by another member or a related entity must be a relative of the other member or a director of the employer and people previously convicted of an offence involving dishonesty are generally disqualified from admission to an SMSF. Severe penalties can be imposed for any breach.

## DETAILS OF EACH EMPLOYER THAT CONTRIBUTES TO THE FUND (IF NONE, SKIP THIS SECTION)

Tick here  if identical to the information in Company Trustee. Please indicate in special instructions if more than one employer

<b>Company Name</b>			
<b>ACN</b>	-	-	
<b>Registered Office</b>			
<b>Full names of all directors</b>			
<b>D1</b>		<b>D2</b>	
<b>D3</b>		<b>D4</b>	

### Annual Update Service

Tick here  if you wish to subscribe to the annual deed update service\*.

\*Receive updates of the fund's deed and PDS each 1 July for \$137.50 if you sign up for direct debit. This service keeps your deed up-to-date with ongoing reforms.

## 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](http://www.dbalawyers.com.au/complete-guide)
- \$440      **Investment Strategy Kit**
- \$150      **FY2012 SMSF Kit**, this kit provides an action list (with detailed commentary) for all relevant SMSF issues to consider in the lead up to 30 June 2012 including contributions, pensions, overseas issues, death benefit nominations, issues relating to investments, annual administration requirements and more. It also 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).

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