



SMSF Change to Trustees or Name

Complete the form below to change the structure, Trustees or name of your SMSF. Your SMSF trust deed will be updated using the details you provide here. Supply additional information in attachment(s) if space in this form is not sufficient.

1 Please select your preference to receive Change to Trustee Kit (If by mail, additional charge of \$20 applies) :

Email Mail

2 Select the appropriate changes (more than one may be selected):

Change SMSF Structure

Change from individual trustees to corporate trustee
 Change from corporate trustee to individual trustees

Change Trustee/Member/Director

Add trustee/member/director
 Remove trustee/member/director

Change SMSF name

3 Current SMSF Name

4 New SMSF Name (if applicable)

5 Date of Establishment of original Deed

6 Date of ordered Trust Deed update

7 Provide details of the current Corporate Trustee (if applicable)

Company Name

ACN

Address

Number of Directors

8 Provide details of the new Corporate Trustee (if applicable)

Company Name

ACN

Address

Number of Directors

9 Number of Members in the fund after update



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10 Provide details of new, continuing and resigning trustees/members/directors

Individual 1 Title (Mr / Mrs/ Ms / etc)

Full Name:

Date of Birth:

Address:

Select positions held: New Trustee New Member New Director
 Continuing Trustee Continuing Member Continuing Director
 Resigning Trustee Resigning Member Resigning Director

Individual 2 Title (Mr / Mrs/ Ms / etc)

Full Name:

Date of Birth:

Address:

Select positions held: New Trustee New Member New Director
 Continuing Trustee Continuing Member Continuing Director
 Resigning Trustee Resigning Member Resigning Director

Individual 3 Title (Mr / Mrs/ Ms / etc)

Full Name:

Date of Birth:

Address:

Select positions held: New Trustee New Member New Director
 Continuing Trustee Continuing Member Continuing Director
 Resigning Trustee Resigning Member Resigning Director

Individual 4 Title (Mr / Mrs/ Ms / etc)

Full Name:

Date of Birth:

Address:

Select positions held: New Trustee New Member New Director
 Continuing Trustee Continuing Member Continuing Director
 Resigning Trustee Resigning Member Resigning Director



SuperHelp Australia Pty. Ltd.

ABN 60 061 126 663

SMSF Change to Trustees or Name

Address: PO Box 208
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Phone: 1 300 736 453
Fax: (02) 8456 5904

To SuperHelp Australia Pty. Ltd.

You are appointed to act as our agent to procure a SMSF Update Kit and ancillary legal documentation from a solicitor, the particulars for such trust deed and legal documents being set out hereunder. In consideration for you acting as our agent, we shall pay you such amount as agreed.

I understand that the fee paid is non-refundable.

I declare that I have not received advice from SuperHelp Australia Pty. Ltd. regarding update of the trust deed.

I am unaware, or have no reasonable grounds to suspect, that a person who is, or is acting as, a responsible officer of the trustee is a disqualified person as defined in section 120(1) of the Superannuation Industry (Supervision) Act 1993.

Name:

Signature:

Date:

Mailing Address: