

APPLICATION FORM

Change Of Trustee - Self Managed Superannuation Fund (SMSF)

Please read the following before completing this application form.

Important information

In accordance with the provisions of the Superannuation Industry (Supervision) Act 1993 (Cth):

- a. (other than sole member funds) all trustees of the fund (either as an individual trustee or director of a corporate trustee) must also be members of the fund;
- b. sole member funds with a corporate trustee – the sole member must be the sole director or one of only two directors (the other director either being a relative or not an employer of the sole member);
- c. sole member funds with individual trustees – the sole member must be one of only two individual trustees (the other trustee either being either a relative or not an employer of the sole member); and
- d. the SMSF must not have more than 4 members.

If you have any questions about completing the application form please contact:

Neal Dallas

Principal

Phone: (07) 3014 6598

Email: ndallas@mcw.com.au

Victoria Mercer

Solicitor

Phone: (07) 3231 0634

Email: vmercerc@mcw.com.au

By completing and submitting the form you confirm as follows:

- a. It is the purchaser's responsibility to ensure that the information supplied is correct.
- b. If new documents have to be prepared as a result of errors in the information a further fee will be payable.

Please ensure you complete all details below, and contact us with any questions you have prior to submitting the form.

PRICE

All prices are for email delivery only. Please mark the relevant box if documents are required in hard copy.

Change the trustee of an SMSF, which includes: To be advised once documents are reviewed

- Preparation of Deed of Retirement and Appointment of Trustee (as applicable); and
- Preparation of relevant forms and attending to stamping of Deed of Retirement and Appointment.

Change of trustee on title of real property owned by the SMSF, which includes: \$250 (plus GST)
Plus LTO fee

- Preparation of Forms 1 & 24 – Transfer;
- Preparation of relevant forms and attending to stamping of transfer documents; and
- Attending to lodgement of transfer documents at QLD Titles Office.

Documents in hard copy Express Post - \$15 Courier - TBC

Note: the above fees are in respect of our professional fees only. An additional fee is payable to the QLD Titles Office upon lodgement of the transfer documents and will be charged in addition to our professional fees.

PURCHASER/ADVISER'S DETAILS

Firm name

Contact name

Telephone

Fax

Email address

Delivery address for documents

Suburb/City

State

Postcode

SUPERANNUATION FUND DETAILS

Name of Fund

ABN

Establishment date

Has the SMSF previously been varied?

Date

Document Title

Date

Document Title

Date

Document Title

Please attach a copy of the current SMSF Trust Deed and all variations and previous changes to the trustee to this application form.

SUPERANNUATION FUND TRUSTEE DETAILS AND MEMBER DETAILS

Corporate trustee details

Name of Corporate Trustee (inc. ACN/
ABN/ARBN)

Registered Office Address

Suburb/City

State

Postcode

List the names of ALL directors

- 1.
- 2.
- 3.
- 4.

The trustee is:

Resigning

Continuing

Being Appointed

Name of Corporate Trustee (inc. ACN/
ABN/ARBN)

Registered Office Address

Suburb/City State Postcode

List the names of ALL directors

- 1.
- 2.
- 3.
- 4.

The trustee is: Resigning Continuing Being Appointed

SUPERANNUATION FUND TRUSTEE DETAILS AND MEMBER DETAILS

Individual trustees and members details

Individual 1

Same as Corporate Trustee

Full Name

Tax File Number

Residential Address

Suburb/City State Postcode

Date of Birth Occupation

This person is a:	Individual Trustee / Director of Corporate Trustee	Member
	Continuing	Continuing
	Resigning	Resigning
	Being Appointed	Being Appointed

Individual 2

Full Name

Tax File Number

Residential Address

Suburb/City State Postcode

Date of Birth Occupation

This person is a:	Individual Trustee / Director of Corporate Trustee	Member
	Continuing	Continuing
	Resigning	Resigning
	Being Appointed	Being Appointed

Individual 3

Full Name

Tax File Number

Residential Address

Suburb/City

State

Postcode

Date of Birth

Occupation

This person is a:

Individual Trustee / Director of Corporate Trustee

Member

Continuing

Continuing

Resigning

Resigning

Being Appointed

Being Appointed

Individual 4

Full Name

Tax File Number

Residential Address

Suburb/City

State

Postcode

Date of Birth

Occupation

This person is a:

Individual Trustee / Director of Corporate Trustee

Member

Continuing

Continuing

Resigning

Resigning

Being Appointed

Being Appointed

RETURNING THIS FORM

After completing this form please either:

- print, sign, and fax it to McInnes Wilson Lawyers at (07) 3221 2921; or
- print, sign, scan, and email it to McInnes Wilson Lawyers at mcwonline@mcw.com.au; or

To print this form for signing click here:

To email this form to McInnes Wilson Lawyers, after confirming instructions below, click here:

CONFIRMATION OF INSTRUCTIONS

The trustees or members or the purchaser/adviser on behalf of the trustees or members agree that all necessary consent have been obtained and that no legal advice has been given in relation to the establishment of the limited recourse borrowing arrangement by McInnes Wilson Lawyers. In particular, McInnes Wilson Lawyers has not provided legal advice to as to whether this structure is compliant with **Superannuation Industry (Supervision) Act 1993** (Cth) requirements.

Name	Sign/Confirmation	or	Date
Name	Sign/Confirmation	or	Date
Name	Sign/Confirmation	or	Date
Name	Sign/Confirmation	or	Date

CREDIT CARD PAYMENTS

Please debit the following credit card for the supply of goods and services indicated on this application form.

Note: Payment by credit card will incur a fee of 1.07% (incl GST) for VISA and Mastercard, and 3% (incl GST) for AMEX, on the GST inclusive price.

Credit card:

Visa
 Mastercard
 American Express

Total Remitted: \$

Expiry date:

plus credit card fee specified above

Cardholder's Name:

Card Number:

Cardholder's Signature:

Date: