



documentshop

Instructions for Change of SMSF Trustee

Your details

Name

Date

Organisation

ACN/ABN

Delivery Address

Phone

Email

Your Ref No.

Delivery options

(please tick the appropriate box)

DIY Print - Please deliver all documents to me via e-mail **\$330***

Hard copy - Please print and deliver all documents to me via courier **\$385***

*** Prices are GST inclusive. Prices do not include any stamp duty that may be payable.**

Order Instructions

Please:

- **complete** the **order form**; and
- **forward** to us the **original Trust Deed** and any **amendments** that have been made (these will be returned) to info@documentshop.com.au.

Fund Details

Name of Fund

State/ Territory of Fund

Date of Fund

Current Trustee Details

[Corporate Trustee or Individual Trustee(s)]

Company

Name & ACN

Registered Office Address

Full Name of Each Director:

Address:

Individual Trustee(s)

Full Name:

Address:

New Trustee Details

[Corporate Trustee or Individual Trustee(s)]

Company

Name & ACN

Registered Office Address

Full Name of Each Director:

Address:

Individual Trustee(s)

Full Name:

Address:

Trustee - What you need to know:

Sole member fund

If the trustees of the fund are to be individuals, there must be two trustees – the sole member and a non-member (the sole member must not be an employee of the other trustee unless they are ** relatives*).

If the trustee of the fund is to be a corporation, the sole member must be:

- the sole director of the corporation; or
- one of two directors (the sole member not being an employee of the other director, unless they are ** relatives*).

Multiple member fund

If the trustees of the fund are to be individuals, each trustee must be a member of the fund (and vice versa).

If the trustee of the fund is to be a corporation, each director must be a member of the fund (and vice versa).

No member of the fund may be an employee of another member, unless they are ** relatives*.

** relatives* include, amongst others, a parent, child, grandparent, sibling, aunt, uncle, spouse and former spouse.

Member[s] details

Address for Member's meeting:

Member Full Name	Member Address	Date of birth		
			<input type="checkbox"/> Current Member	If Current Member
			<input type="checkbox"/> New Member	<input type="checkbox"/> Continue
				<input type="checkbox"/> Cease
			<input type="checkbox"/> Current Member	If Current Member
			<input type="checkbox"/> New Member	<input type="checkbox"/> Continue
				<input type="checkbox"/> Cease
			<input type="checkbox"/> Current Member	If Current Member
			<input type="checkbox"/> New Member	<input type="checkbox"/> Continue
				<input type="checkbox"/> Cease
			<input type="checkbox"/> Current Member	If Current Member
			<input type="checkbox"/> New Member	<input type="checkbox"/> Continue
				<input type="checkbox"/> Cease

Members - What you need to know:

Maximum of 4 members.

No member may be an employee of another member, unless they are ** relatives*.

** relatives* include, amongst others, a parent, child, grandparent, sibling, aunt, uncle, spouse and former spouse.

Contributing Employer
(if any)

Name

ACN

Stamping

The Deed of Appointment of Trustee may be required to be stamped in the relevant jurisdiction. Please advise if you require our assistance with this process and we can provide you with a quote to do so.

Logo

Would you like us to include your logo on the documents?

- Yes - please e-mail to us your logo for insertion
 No - we will include the Document Shop logo

Other requirements (if any)

Acceptance of terms and conditions

By ticking this box, I/we acknowledge that I/we have read and agree to the Document Shop Pty Ltd *terms and conditions and acknowledgement* [available on our website at www.documentshop.com.au or contact us at info@documentshop.com.au and we will e-mail or post a copy to you].

Payment

Please debit the following credit card by the amount of \$ _____ (GST inclusive):

Type of Card Mastercard Visa Bankcard

Card Number _____ Expiry Date _____ CSC _____

Name on Card _____ Signature _____

Please return this order form to info@documentshop.com.au.
Your order will be processed once payment has been received.