

General Details

Date of Deed of Variation:

The date should be the day on which the Trustee signs the Trust Deed

Date of Superannuation Fund Deed:

Existing Deed

Is the Trustee of the Superannuation Fund a Company or Individuals:

Company

Individuals

In relation to SMSF, the trustee can either be a Company of which the members are both directors and shareholders or the trustee can be the members in their individual capacities.

Name of Superannuation Fund:

It is not necessary to include "the" at the start of the name of the Fund, but include the words "Superannuation Fund" at the end. If the Superannuation Fund Name includes "The", tick the box below – DO NOT include it here

Does the Superannuation Fund Name include "The" at the beginning?

Yes

No

State of Applicable Law:

QLD

NSW

VIC

ACT

SA

Please circle the relevant option

If the Trustee is a Company

Name and ACN:

Including ACN for example YOUR COMPANY PTY LTD ACN 000 000 000

Name of First Director:

Whenever an individual is to be referred to their full names should be used (ie including their middle name)

Name of Second Director:

Name of Third Director:

Name of Fourth Director:

If the Trustee(s) are individual(s), there must be at least two and no more than four individuals

Name of First Trustee:

Whenever an Individual is to be referred to in the Trust Deed their full names should be used (including any middle names)

Name of Second Trustee:

Name of Third Trustee:

Name of Fourth Trustee:

Power of Amendment				
Who has the power to amend the Superannuation Fund:	Option A – Trustee Only	Option B – Trustee with consent of another	Option C – Trustee with approval or sanction of another	Option D – Trustee and another
<i>Please circle</i>				
<i>If Option B, C or D chosen</i>				
Description of other person(s)/entity(s):	<i>Example: Employer, Founder, Standard Employer Sponsor, Members, Standard Employer Sponsor and Members (don't type "the"). If no label is given to other person/entity in the deed insert most relevant description</i>			
Is First "Other" an Individual or Company?	Individual		Company	
<i>Check original Deed</i>				
Name of First "Other":	_____			
Is Second "Other" an Individual or Company?	Individual		Company	
<i>If applicable. Check original Deed</i>				
Name of Second "Other":	_____			
Is Third "Other" an Individual or Company?	Individual		Company	
<i>If applicable. Check original Deed</i>				
Name of Third "Other":	_____			
Is Fourth "Other" an Individual or Company?	Individual		Company	
<i>If applicable. Check original Deed</i>				
Name of Fourth "Other":	_____			
Is Fifth "Other" an Individual or Company?	Individual		Company	
<i>If applicable. Check original Deed</i>				
Name of Fifth "Other":	_____			
Is Sixth "Other" an Individual or Company?	Individual		Company	
<i>If applicable. Check original Deed</i>				
Name of Sixth "Other":	_____			

PAYMENT FORM

Please forward these details together with the completed instruction sheet

CONTACT NAME:

FIRM NAME:

TELEPHONE NO: **FAX NO:**

DELIVERY ADDRESS:

.....

.....

DELIVERY EMAIL:

Credit Card Payment

Card Type (*please circle*): Mastercard Visa

Card No.:

Expiry Date: /

Amount: \$400.00

Name of Cardholder:

Signature:

Once complete email instruction sheet and payment details to the Legal Resource Club – Fax 07 3252 1355 or Email clearlaw@clearlyhoare.com.au