

SMSF Change of Trustee

Outlined below is a checklist of the information needed to complete a SMSF Change of Trustee Order.

Fund Details

- Name of the Superannuation Fund
- TFN
- ABN
- Meeting Address of the Fund
- Date of Establishment of Fund
- Add date of variation? (i.e. if there have been any prior variations to the SMSF Deed, please provide the dates on which those variations were executed)
- Action type: removal, retirement, resignation, dismissal
- Appointment Clause and Removal/Retirement/Resignation/Dismissal Clause (the clause number for the clauses within the trust deed which provides the power to appoint and remove/retire/resign/dismiss trustees)

Existing Trustee Details

If individual trustee:

- Full name/address for each existing trustee
- The date of birth of each existing trustee
- TFN(optional)
- Gender
- Title
- Is this trustee a member of the Fund?

If corporate trustee:

- ACN
- Company Name
- Registered address
- Full name/address of director/s of the trustee company
- Date of Birth of director/s
- TFN of director/s (Optional)
- Gender (of director/s)
- Title
- Is this director a member of the Fund?

New Trustee Details

Please provide the details for any continuing or new trustees.

If individual trustee:

- The full name and address of each existing trustee
- The date of birth of each existing trustee
- TFN(optional)
- Gender
- Title
- Is this trustee a member of the Fund?

If corporate trustee:

- ACN
- Company Name
- Registered address
- Full name/address of director/s of the trustee company
- Date of Birth of director/s
- TFN(optional)of director/s
- Gender (of director/s)
- Title
- Is this director a member of the Fund?

Members

- Full name of each member
- Address of each member
- Date of Birth of each member

Additional Party

Does this Fund have extra parties i.e. principal employer, employer sponsor?

If Yes:

- Full name of party
- Select party type

If Individual:

- The full name and address of each individual

If Corporate:

- Name of the company, ACN and registered address of the company
- Full names, address of director/s

Should you have any queries regarding this checklist, please refer to our Help Centre articles or contact the Support Team.