

SMSF Deed of Variation

Outlined below is a checklist of the information needed to complete a SMSF Deed of Variation order. Please refer to the relevant article in our Help Centre to understand the effect of executing this Deed.

Fund Details

- Name of the Fund
- Jurisdiction of the Fund
- Date of Establishment of the Fund
- Add Date of Variation? (i.e. if there have been any prior variations to the Fund, please provide the dates on which these variations were executed) and Variation Clause (the clause number for the clause providing the power to vary the Deed)

Member Details

- Full name and address
- Member's date of birth

Trustee Details

If the Fund has individual trustees:

- Full name of each individual trustee
- Address of each individual trustee

If the Fund has a corporate trustee:

- Name of the company
- ACN of the company
- Registered address of the Company
- Full name/address of director/s of the trustee company

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