

## Update to Superannuation Deed Information Checklist

- The date the original SMSF was established
- Which State's (or Territory's) laws apply to the SMSF
- The name and address details for each individual member, and trustee of the SMSF.  
If the trustee is a company, then include its:
  - ACN/ABN, and
  - Registered Office address
- The number of the clause in the SMSF's deed that allows the deed to be amended. Also, check carefully to see if the consent of anyone other than the trustee is required before the deed can be changed.  
If someone else's consent is required, you need:
  - Their name
  - The defined term used to refer to that person or entity in the original deed
  - If they are still involved in the deed, then you need their address
  - If they aren't involved, then you need the name and address of any person who has replaced them
- The names of the parties to the SMSF's original deed.
- Details of all previous amendments to the SMSF's deed. For each amendment, give:
  - the amending deed's name
  - the amending deed's date
  - the names of all the parties to the amending deed.
- You need the names of who is to chair meetings, where the meetings will be held, and who is to sign documents. But that information should be clear if you've gathered the information above.



To create the documents to update the deed for an existing SMSF and make it FSR compliant, you need to provide the information listed to the left. You might like to print this checklist out and gather the information before you start online.

Client Notes

...continued

Any questions? Call our helpline on 1300 307 343

# Update to Superannuation Deed Checklist Continued

## Death Benefit Nominations

- Decide if any members wish to update their Death Benefit Nominations (an additional \$49.50 fee covers updating the nominations for all the members of the SMSF).

For each member who wishes to update their Death Benefit Nomination, you need to give the following information about each of their beneficiaries:

- name
- relationship to member
- percentage of the benefit they will receive.

You also need to decide whether the Nominations are to bind the trustee.

## Printing and Binding

- For an additional \$49.50, do you want Cleardocs to print, bind and express courier deliver these documents to you?



To create the documents to update the deed for an existing SMSF and make it FSR compliant, you need to provide the information listed to the left. You might like to print this checklist out and gather the information before you start online.

Client Notes