Cleardocs
clarity | simplicity | ease of use

Information Checklist

To create a Change of SMSF Trustee document package, you need to provide the information listed to the left. Print this checklist out for convenience and gather the information before you start online.

Change of SMSF Trustee

Fund and member information

- [ ] The name of the fund.
- [ ] The date of the original deed that established the SMSF.
- [ ] The number of members the fund will have and their name, D.O.B. and address.

Notes

Trustee and employer information

- [ ] Whether the trustee is a company or one or more individuals
  - if yes, then provide:
    - company name, address and ACN.
    - the number of directors the corporate trustee has, their name and addresses.
    - whether the trustee will execute the change of trustee by affixing its common seal.
  - if the trustee is one or more individuals then provide:
    - name,
    - address,
    - D.O.B.,
    - place of birth,
    - occupation.
- [ ] Whether the fund has a current "Employer sponsor" or a current "Participating Employer".

Notes

Deed Amendments

- [ ] Whether the fund's original deed has been amended before. If yes, then provide:
  - the number of times it has been amended.
  - the name of the amending deed.
  - the date of the amending deed.
- [ ] Whether there are any clauses from the original deed that need to be preserved that states it cannot be amended.

Notes

Change to Trustee

- [ ] State the change that is being made to the trustee.
- [ ] Trustee meeting details to approve the change of trustee and the updates to the fund's deed including:
  - attendees of the meeting.
  - person who will chair the meeting.
  - the venue, date and time that the meeting will be held.

Notes