

To create an Update to SMSF 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.

## Update to SMSF

### Fund and member information

- The name of the fund.
- The date of the original deed which established the SMSF.
- The date of the Deed of Variation.
- The jurisdiction's laws that apply to the trust deed.
- The name and address details of the members.

### Trustee details

- Whether the trustee is a company.
  - if yes, then provide:
    - the number of directors the corporate trustee has.
    - company name, ACN and address details.
    - whether it will execute the trust deed by affixing its common seal.
  - if the trustee is not a company then provide:
    - the name of the trustees and address details.

### Current Deed details

- The number of the clause in the SMSF's current Deed that allows the Trustee to vary, amend or change the Deed.
- The clauses that need to be preserved in the current deed that states it cannot be amended.
- Whether the fund has a current 'Employer Sponsor' or a current 'Participating Employer'.
- Whether the fund's current deed names an 'Employer Sponsor' or 'Participating Employer'.
- Apart from the trustee, whether the deed requires consent of anyone else before the current deed can be updated.
- The parties that to the original deed that established the SMSF.

### Deed amendments

- Whether the fund's original deed been amended before
- Details of the SMSF's trustees meeting to approve the Deed of Variation and the updates to the SMSF's current deed:
  - attendees of the meeting.
  - person who will chair the meeting.
  - the venue, date and time that the meeting will be held.

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