

To create an Amendment to SMSF borrowing 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.

Amendment to SMSF borrowing

Fund and Custody Trust info

- The name of the SMSF fund.
- The name of the trustee/s.
- The name of the custody trust.
- Date the custody trust was executed.

Variation

- The changes being made to the custody trust:
 - change in lender only.
 - change in the investment details only.
 - change in both the lender and the investment details.
- The clause number in the deed that allows the custody trust to be varied.
- If there is a change in lender you will need:
 - the original lender name and ACN.
 - the new lender name, ACN and address .
- If there is a change in investment details you will need:
 - the name of the state whose jurisdiction laws will apply.
 - the loan amount and length of loan.
 - the settlement date.
 - the type of asset the trustee of the fund is acquiring.
- If the change is to both the lender and the investment you will need all information mentioned above.

Signing

- The date the deed of variation will be executed.

NOTES

NOTES

NOTES
