

Death Benefit Agreement

Before you start

- The SMSF needs to have a version of the Cleardocs deed that applied from 4 May 2009. If the fund currently:
 - has a Cleardocs deed, you can check which version it has by logging in at Cleardocs and clicking the light blue "Version X of Y" button beside the relevant SMSF in your list of documents.
 - does not have a Cleardocs deed, then you can update to a Cleardocs Deed for \$129.25.

Fund details

- Name of the SMSF.

Member information

- Number of members the SMSF has, their name and address details. In the case of multiple members, confirm:
 - the member that wants to arrange a Death Benefit Arrangement,
 - the beneficiary the member wants to appoint,
 - the relationship with the beneficiary, and
 - the proportion of death benefit the beneficiary is to receive.
- In the case of the beneficiary dying before the member, confirm how the member wants the death benefit distributed.

Trustee information

- Decide whether the trustee is a company or one or more individuals:
 - if the trustee is a company, then provide the following information:
 - the company name.
 - ACN.
 - address.
 - whether it will execute the Trust by affixing its common seal.
 - if the trustee one or more individuals, then provide the following information for each:
 - full name.
 - address.

To create a Death Benefit Agreement 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.

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