



To create an SMSF Wind Up 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.

SMSF Wind Up

Fund details

- The name of the fund.
- The name and contact details of the contact person.
- The name and address details of the members.
- Confirm whether the trustee is a company:
 - if the trustee is a company, then include:
 - the company name,
 - ACN, and
 - Name of director/s.
 - if the trustees are one or more individuals, then include:
 - the name and address details of the individual/s.

Meeting or resolution

- Details of the meeting, if relevant, to wind up the fund:
 - the venue, date and time that the meeting will be held.
 - attendees of the meeting.
 - Person who will chair the meeting.

Employer-sponsor

- Whether the fund has an employer-sponsor or principal employer. If so, then include their name.

Winding up

- The number of the clause in the SMSF's current Deed that allows the trustee to commence winding up of the fund.

Notes
