



# SMSF Deed Upgrade Order Form

Name	<input type="text"/>	Phone	<input type="text"/>
Firm	<input type="text"/>	E-mail	<input type="text"/>

## SMSF Details

SMSF Name	<input type="text"/>		
Original Deed Date	<input type="text"/>	Last Amendment Date	<input type="text"/>
Address for Meeting	<input type="text"/>		

Please submit a copy of the original deed (and any documents that have amended it) together with this order form.

## Corporate Trustee

**IMPORTANT: Full, verifiable names are required.**

Name	<input type="text"/>			
ACN	<input type="text"/>			
Officer Names and Roles (First Officer listed to be Chairman, first 2 Officers to be signatories)	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary		
	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary		
	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary		
	<input type="checkbox"/> Director	<input type="checkbox"/> Secretary		

## Individual Trustees

Name	<input type="text"/>
Email Address	<input type="text"/>
Name	<input type="text"/>
Email Address	<input type="text"/>
Name	<input type="text"/>
Email Address	<input type="text"/>
Name	<input type="text"/>
Email Address	<input type="text"/>

## Members

Name	<input type="text"/>
Name	<input type="text"/>
Name	<input type="text"/>
Name	<input type="text"/>

## Principal Employer/Other Party

Name	<input type="text"/>	
	<input type="checkbox"/> PRINCIPAL EMPLOYER	<input type="checkbox"/> OTHER (list type of role) <input type="text"/>
Name	<input type="text"/>	
	<input type="checkbox"/> PRINCIPAL EMPLOYER	<input type="checkbox"/> OTHER (list type of role) <input type="text"/>

Any Member under a legal disability (e.g. minors) must be represented by a Legal Personal Representative.

Please return this completed form to [acis@acis.net.au](mailto:acis@acis.net.au), Freefax 1800 655 556 or Locked Bag 1, Fortitude Valley Q 4006

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## Additional Information/Special Instructions

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## Payment Details

Please debit the following card details by the amount of \$

Type of Card	<input type="checkbox"/> Visa	<input type="checkbox"/> Mastercard	<input type="checkbox"/> Diners Club*	<input type="checkbox"/> Amex*	*3% SURCHARGE APPLIES		
Card Number	<input type="text"/>			Expires	<input type="text"/>	CCV	<input type="text"/>
Name on Card	<input type="text"/>			Signature	<input type="text"/>		

## Completing this Order Form

### Self Managed Superannuation Funds

**Trustee / Member** - Generally, under the Superannuation Industry (Supervision) Act 1993:

- (a) ALL fund members must be trustees (or directors of a corporate trustee) and ALL trustees (or directors of a corporate trustee) must be fund members;
- (b) sole member funds without a corporate trustee must have at least 2 individual trustees one of whom is the sole member;
- (c) sole member funds with a corporate trustee may have a single director being the sole member, or 2 directors one of whom must be the sole member.
- (d) an SMSF must not have more than 4 members

**Legal Personal Representative** - If a member is a minor or otherwise incapacitated (infirm or mentally incapable), they must be represented by an individual trustee/director of a corporate trustee who is over 18 and having full legal capacity.

**Other Roles** - Occasionally (and particularly in some older funds) a position such as a Founder, Guardian or Principal is incorporated into the fund's trust deed. These roles are generally no longer required and our standard Governing Rules do not make reference to such roles. However, on some occasions, the trust deed may require the consent of the holder of such positions as a condition of amendment to the Governing Rules and therefore we require the relevant details to be provided.

**Principal Employer** - If the Fund currently has a Principal Employer, please advise on page 1 of the order form. In some circumstances, superannuation fund trust deeds that were established with Principal Employers require the consent of the Principal Employer for amendments to be made to the deed. Should the previous trust deed have a Principal Employer listed, they may need to be party to any deed of amendment. If the Principal Employer listed in the previous deed no longer holds that position, please advise when submitting the order form.