

Change of SMSF Trustee (death of a trustee)

SMSF's current details

- Name of the fund.
- The date the original SMSF was established.
- State or Territory laws that apply to the SMSF.
- Name and address details for each existing member and trustee. If the trustee is a company, then include its:
 - ACN, and
 - registered office address.
- Name of the trustee that has passed away.
- Name and address details of any participating employer or employer sponsor. If any of them is a company, then include its:
 - ACN, and
 - registered office address.

New trustee details

- The name and address details for each new trustee of the SMSF. If the new trustee is a company, then include its:
 - ACN, and
 - registered office address.
- The number of the clause in the SMSF's deed that allows the trustee(s) to be removed, to retire, or to be appointed.
- Details of all previous amendments to the SMSF's deed. For each amendment, give:
 - the amending deed's name,
 - the amending deed's date, and
 - the names of all the parties to the amending deed.
- You need the names of who is to chair meetings, where the meetings will be held, and who is to sign documents. But that information should be clear if you've gathered the information above.

To create a Change of SMSF Trustee (death of a trustee) 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.

Notes

Notes
