

Discounted Deed Voucher

Request to Establish / Amend a Superannuation Fund Trust Deed

Superannuation Seminar Attendees Only (50% discount on a fund establishment or amendment) **Expires 30 June 2021**

Fund Name: **Superannuation Fund**

The Trustee seeks Regulated Fund Status under
☐ Corporations (Company Trustee) or ☐ Pensions Power (Individual Trustee)

Fund Commencement Date: ____ / ____ / ____ **Fund Variation Date:** ____ / ____ / ____

Current Principal Employer (complete if applicable)

Current Principal Employer: A.C.N.:
Registered Office Address:
Directors of Principal Employer:

Corporate Trustee Details (complete if applicable)

Company Name: A.C.N.:
Registered Address:
Directors of Corporate Trustees:

Members & Individual Trustees

Full Name: (Prof / Dr / Mr / Mrs / Miss / Ms)

Address:

Date of Birth: ____ / ____ / ____ Occupation:

☐ Member ☐ Director ☐ Individual Trustee Eligible Service Date: ____ / ____ / ____

Full Name: (Prof / Dr / Mr / Mrs / Miss / Ms)

Address:

Date of Birth: ____ / ____ / ____ Occupation:

☐ Member ☐ Director ☐ Individual Trustee Eligible Service Date: ____ / ____ / ____

Full Name: (Prof / Dr / Mr / Mrs / Miss / Ms)

Address:

Date of Birth: ____ / ____ / ____ Occupation:

☐ Member ☐ Director ☐ Individual Trustee Eligible Service Date: ____ / ____ / ____

Full Name: (Prof / Dr / Mr / Mrs / Miss / Ms)

Address:

Date of Birth: ____ / ____ / ____ Occupation:

☐ Member ☐ Director ☐ Individual Trustee Eligible Service Date: ____ / ____ / ____

Accountant Declaration

- ☐ I confirm my client has received a Statement of Advice (SoA) and the above is consistent with this advice.
☐ My client will need a Statement of Advice (SoA)

Contact Name: Telephone:

Address: Fax:

Signature Name: Signed: Date Requested: ____ / ____ / ____

For Establishment: Please provide the completed application form together with additional information as required by email to super@tagfinancial.com.au

For Amendment: Please provide a scanned copy of the original trust deed and any amendments thereto, together with the completed application form to super@tagfinancial.com.au