**SMSF Deed Update Order Form**

A picture containing text, font, logo, graphics

Description automatically generated

**To order your SMSF Deed Update documents:**

1. Complete all relevant fields.
2. Attach a copy of the Fund’s most recent Trust Deed, as well as any documentation recording a change in the Fund’s Trusteeship/Membership, or the Fund’s Principal Employer/Employer Sponsor, since your last Trust Deed Upgrade.
3. Mail this form, along with the documentation outlined above or email to TAG Financial Services at **super@tagfinancial.com.au**

**SECTION A: Adviser Ordering Details**

|  |  |
| --- | --- |
| Name: | Signature: |
| Company Name: | |
| Postal Address: | |
| Date Of Order:    /    / | Your Ref: |
| Phone: (     ) -       - | Fax: (     ) -       - |
| Email: | |

**SECTION B: Fund Details**

|  |  |  |
| --- | --- | --- |
| Name of Fund: | | |
| Registered address of the Fund: |  | |
| Establishment Date of the Fund: | /    / | |
| Variation Dates of the Fund’s  Trust Deed: | /    /      ;     /    /     ; | /    /     /    / |
| State Law the Fund is governed by: |  | |

**SECTION C (I): Details of Each Member**

|  |  |  |
| --- | --- | --- |
| **Member 1** | Full Name: | |
| Address: | | |
| Individual Trustee (tick if appropriate): | | Director of Corporate Trustee (tick if appropriate): |

|  |  |  |
| --- | --- | --- |
| **Member 2** | Full Name: | |
| Address: | | |
| Individual Trustee (tick if appropriate): | | Director of Corporate Trustee (tick if appropriate): |

|  |  |  |
| --- | --- | --- |
| **Member 3** | Full Name: | |
| Address: | | |
| Individual Trustee (tick if appropriate): | | Director of Corporate Trustee (tick if appropriate): |

|  |  |  |
| --- | --- | --- |
| **Member 4** | Full Name: | |
| Address: | | |
| Individual Trustee (tick if appropriate): | | Director of Corporate Trustee (tick if appropriate): |

|  |  |  |
| --- | --- | --- |
| **Member 5** | Full Name: | |
| Address: | | |
| Individual Trustee (tick if appropriate): | | Director of Corporate Trustee (tick if appropriate): |

|  |  |  |
| --- | --- | --- |
| **Member 6** | Full Name: | |
| Address: | | |
| Individual Trustee (tick if appropriate): | | Director of Corporate Trustee (tick if appropriate): |

**SECTION C (II): Non-Member Trustee**

If the Fund is a single Member Fund with a Trustee who is not a Member, enter the Non-Member Trustee details below.

|  |  |  |
| --- | --- | --- |
| Trustee | Full Name: | |
| Address: | | |
| Individual Trustee (tick if appropriate): | | Director of Corporate Trustee (tick if appropriate): |

**SECTION D: Corporate Trustee Details (if applicable)**

|  |  |
| --- | --- |
| Company Name: | ACN:     -     - |
| Registered Address: | |
| Company Chairman: | |

**SECTION E: Details of Additional Party**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Does the Fund have any of the following parties? | | | | | | |
| Founder | | Principal | Principal Employer | | | Employer Sponsor |
| Name/s: | | | | | ACN:     -     - | |
| Registered Office: | | | | | | |
| **Director 1** |  | | **Director 2** |  | | |
| **Director 3** |  | | **Director 4** |  | | |
| **Director 5** |  | | **Director 6** |  | | |
| Who will act as Chairman? | | | | | | |