

The Portfolio Service SMSF

Fund notice of change of details

Fund name	
Fund reference number	
Effective date	

1. Change of primary contact address details

New primary contact address			
Suburb	State	Postcode	
Email			

2. Change of fund's trustee structure

Complete this section if the fund's trustee structure is changing (but the membership remains the same).

Nominate new trustee structure

Individual trustees

Corporate trustees

Company name	
Company ACN	

If you would like us to help you setup a company to be your corporate trustee, please complete the 'SMSF company registration form'. Do NOT complete the individual details below.

For each new individual trustee or director of the corporate trustee of the fund, please provide the following information:

Trustee/director 1		Trustee/director 2	
Title (Mr, Mrs, Ms, etc)			
Given name(s)			
Surname			
Date of birth			
TFN			
Is the trustee/director also a member of the fund?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Trustee/director 3		Trustee/director 4	
Title (Mr, Mrs, Ms, etc)			
Given name(s)			
Surname			
Date of birth			
TFN			
Is the trustee/director also a member of the fund?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	

3. Retirement of trustee/director

Complete this section if a trustee/director is retiring, but the existing trustee structure remains the same

Please select the relevant option

Retirement of trustee/director 1

Name of retiring trustee	
Reason for retirement	
Date of retirement	

Retirement of trustee/director 2

Name of retiring trustee	
Reason for retirement	
Date of retirement	

Retirement of trustee/director 3

Name of retiring trustee	
Reason for retirement	
Date of retirement	

Retirement of trustee/director 4

Name of retiring trustee	
Reason for retirement	
Date of retirement	

If the trustee/director will also cease to be a member of the fund, please complete and attach a 'Benefit payment request form'.

4. Appointment of new trustee/director

Enter the details of each new trustee in table below:

	Trustee/director 1	Trustee/director 2	Trustee/director 3
Title (Mr, Mrs, Ms, etc)			
Given name(s)			
Surname			
Date of appointment as new trustee	/ /	/ /	/ /
Date of birth	/ /	/ /	/ /
Address (cannot be PO Box)			
Postal address (if different to above)			
Telephone			
Email			
TFN			

If the new trustee will also be a member, please complete and attach an 'Admittance of new member form'.

5. Trustee declaration and signature

The trustees of the fund provide this notice to AET and request that AET update the fund's record(s) and, where applicable, notify the Regulator(s) and/or prepare the necessary documentation to enable the change in trustee structure. By signing this form, the trustees authorise AET to deduct the appropriate fee from the fund's operating cash account.

Signed by*

*All trustees/directors are required to sign.

Corporate trustee name (if applicable)	
Trustee/director name	
Trustee/director signature	
Date	
Trustee/director name	
Trustee/director signature	
Date	
Trustee/director name	
Trustee/director signature	
Date	
Trustee/director name	
Trustee/director signature	
Date	

Please return to:

Email: forms@aetlimited.com.au

Fax: 1800 781 166

Or post

The Portfolio Service SMSF

Administration Services

GPO Box 546

Adelaide SA 5001