



## **DATA SHEET – TO MODIFY DEED AND ROPS APPLICATION**

All SMSF members **must** be over the age of 55.

<u><b>Adviser Contact Details</b></u>			
<b>Name:</b>			
<b>Company:</b>			
<b>Postal Address:</b>			
<b>Phone:</b>	(    )	<b>Fax:</b>	(    )
<b>Email:</b>			
<b>Invoice:</b>	<input type="checkbox"/> Invoice to Adviser	<input type="checkbox"/> Invoice to Client	

<u><b>Fund and Trustee Details</b></u>			
<b>SMSF Name:</b>			
<b>Date of Establishment of Trust:</b> /        /			
<b>Deed Previously Amended:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No			
<b>Address (as per Super Lookup)</b>			
Suburb:	State:	Post Code:	
<b>Fund ABN:</b>		<b>Fund TFN:</b>	
<b>Type of Trustee:</b> <input type="checkbox"/> Individual <input type="checkbox"/> Corporate			
<b>Full Name Trustee/Director 1:</b>			DOB    /    /
<b>Full Name Trustee/Director 2:</b>			DOB    /    /
<b>Full Name Trustee/Director 3:</b>			DOB    /    /
<b>Full Name Trustee/Director 4:</b>			DOB    /    /
<b>or Corporate Trustee (1):</b>		Pty Ltd	<b>ACN:</b>

<u><b>Administrator Details (It could be the trustee)</b></u>		
<b>Address</b>		
		<b>State:</b>
		<b>P/Code:</b>
<b>Contact Person:</b>		
<b>Contact Email:</b>		
<b>Contact Telephone:</b> (    )		
<b>Company (if relevant) :</b>		

(1) Fill in directors/members also under individuals section

Fee for both Deed Amendment and HMRC Application Drafting is \$440 (incl. GST)

**Additional Comments:**

**Email to [brian@netactuary.com.au](mailto:brian@netactuary.com.au) (preferred)**

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SANDY BAY TAS 7006**

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