

SUPERANNUATION FUND/TRUST — CHANGE OF NAME

Please complete all details in block letters.

Delivery of documents (electronic/hardcopy)	
Documents will be delivered electronically in PDF format. Alternatively, tick here to receive hardcopy documents (additional \$50 plus delivery costs)	<input type="checkbox"/> Hardcopy delivery
Current name of Fund/Trust	

Proposed name of Fund/Trust	
------------------------------------	--

INFO/DOCUMENTS

Please provide us with a copy of the current deed which is dated (dd/mm/yyyy): _____ / ____ / ____

PERSON ORDERING

Firm Ordering (if applicable)					
Person ordering					
Tick here <input type="checkbox"/> if we are to invoice the fund's trustee (otherwise, our invoice will be made out to the person ordering).					
Street address					
Postal address, if different					
Phone		Fax		Email	

COMPANY OR INDIVIDUAL TRUSTEES

COMPANY TRUSTEE						
Company Name						
ACN	-	-				
Registered Office						
Full names of all directors						
T1				T2		
T3				T4		

OR

INDIVIDUAL TRUSTEES					
T1	Full Name				
	Street Address				
T2	Full Name				
	Street Address				
T3	Full Name				
	Street Address				
T4	Full Name				
	Street Address				

MEMBERS (FOR AN SMSF ONLY)

M1	Full Name	T1? <input type="checkbox"/>
	Street Address	
M2	Full Name	T2? <input type="checkbox"/>
	Street Address	
M3	Full Name	T3? <input type="checkbox"/>
	Street Address	
M4	Full Name	T4? <input type="checkbox"/>
	Street Address	

SMSF PRODUCTS: tick to order

- Free** **Newsletter**, SMSF technical updates and seminar news
- \$550 **The Complete Guide to SMSFs and Planning for Loss of Capacity and Death**, this 140+ page book details everything you need to know about SMSF succession planning. It is updated each August. Tick here to also receive the next updated version for an additional \$110 (payable upon receipt of updated version). For full terms and conditions, see www.dbalawyers.com.au/complete-guide
- \$440 **Investment Strategy Kit**
- \$150 **FY2012 SMSF Kit**, this kit provides an action list (with detailed commentary for each item) running you through all relevant SMSF issues to consider in the lead up to 30 June 2012. The action list includes contributions, pensions, overseas issues, death benefit nominations, issues related to the SMSF's investments, annual administration requirements and more. The kit includes a useful and practical tool that assists in calculating minimum pension amounts.
- \$150 **Trustee Compliance Kit**
- \$440 per pension **Pension Commencement Kits**
I want to start: _____ (insert 1, 2, 3, etc) Account-Based Pension(s)
or tick here if Transition to Retirement Income Stream
- \$220 **SMSF Borrowing Memo**

Please also see <http://www.dbalawyers.com.au/> for further information.

SPECIAL INSTRUCTIONS

Note that DBA is not licensed to provide financial product advice under the *Corporations Act 2001* (Cth).