

Additional \$50 fee applies unless ordered online

From 1 August 2021 unless documents are ordered online at <https://online.dbalawyers.com.au/login> an additional \$50 fee applies per suite of documents.

For a tutorial video see <https://www.dbalawyers.com.au/online-ordering>

When ordering online you receive a quicker turn around and many other benefits, with no compromise on quality.

Order online to receive priority service at <https://online.dbalawyers.com.au/login>

SMSF DEED UPDATE		<i>Please complete all details in block letters.</i>
Firm ordering (if applicable):		
Person ordering:		
Street address:		
Postal address (if different):		
Phone:	Email:	
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).		
Documents will be delivered by email as PDF files.	Tick here <input type="checkbox"/> for hardcopy delivery (fee applies) Tick here <input type="checkbox"/> if you want a ring binder	

NAME OF FUND
Name of SMSF:
Please provide a copy of the current deed which is dated (dd/mm/yyyy): We assume that you hold a complete, original hardcopy of each document given to us. If the original document for any deed forming the document trail of the Fund cannot be found, this places all documents of the Fund in doubt and may result in considerable risk. Please contact us to discuss options to proceed if documents are lost.
Was this SMSF established, varied or updated by DBA previously? <input type="checkbox"/> Yes <input type="checkbox"/> No
Please provide deed reference (eg, 1234:176026) (located on front of deed or cover letter): _____ : _____

ANNUAL UPDATE SERVICE
Tick here <input type="checkbox"/> if you wish to subscribe to the annual deed update service*. <i>*Receive updates of the fund's deed and PDS each 1 July for \$137.50 if you sign up for direct debit. This service keeps your deed up-to-date with ongoing reforms.</i>

SMSF DEED HISTORY REVIEW
Tick here <input type="checkbox"/> if you require us to review the entire deed document trail (if more than one prior deed). This extra service is recommended if an SMSF has more than one prior deed and a cost will be from \$1,250 (in addition to the deed update cost). Our charge will be confirmed once we do a preliminary review of the documents received. Please forward any additional deeds and change of trustee documents requiring our review. We review the full deed history of the SMSF to see if there are any issues that require remedial work. This remedial work is aimed at ensuring the SMSF's governing rules are as resistant to legal challenge as possible. Remedying any issues in a timely manner is far more cost and time effective than being exposed to legal challenge, ATO scrutiny, or other uncertainty at a later date. If any further work is recommended, we provide an estimate for this work in our report. Please see our website (http://www.dbalawyers.com.au/smsf-deed-update) for further information.

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

M1

Full name:

T1?

Street address:

M2

Full name:

T2?

Street address:

M3

Full name:

T3?

Street address:

M4

Full name:

T4?

Street address:

Note that any member employed by another member or a related entity must be a relative of the other member or a director of the employer and people previously convicted of an offence involving dishonesty are generally disqualified from admission to an SMSF. Severe penalties can be imposed for any breach.

SPECIAL INSTRUCTIONS

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