

<b>SMSF DEED HISTORY REVIEW</b>		<i>Please complete all details in block letters</i>	
Firm ordering:			
Person ordering:			
Street address:			
Postal address (if different):			
Phone:		Fax:	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 (POA).			
<b>NAME OF FUND</b> (scope of SMSF deed history review)			
<p>The review covers the deed of establishment, any subsequent deeds of variation, any deeds of change of trustee, or any other like change to an SMSF's governing rules. 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 often far more cost and time effective than being exposed to legal challenge, ATO scrutiny, or other uncertainty at a later date.</p> <p>If any further work is recommended, we provide an estimate for this work in our report.</p> <p>Our fees for this review are from \$1,250. We confirm our fee when we undertake a preliminary review of the documentation.</p> <p>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.</p> <p>Further information can be found on our website (<a href="http://www.dbalawyers.com.au/smsf-deed-history-review">http://www.dbalawyers.com.au/smsf-deed-history-review</a>).</p>			
Name of fund here:			
<b>DOCUMENTS</b>			
<b>Please provide copies of:</b>			<b>Attached?</b>
The establishing deed All deeds of variation or changes to the governing rules All deeds of change of trustee			<input type="checkbox"/>
<b>COMPANY TRUSTEE</b>			
Company name:			
ACN:			
Registered office:			
T1		T2	
T3		T4	
<b>OR, INDIVIDUAL TRUSTEES</b>			
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 <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:	

**SPECIAL INSTRUCTIONS**


**IMPORTANT NOTES**

## General

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