

ADMISSION OF CONDITIONAL MEMBER TO AN SMSF		Please complete all details in block letters
Firm ordering (if applicable):		
Person ordering:		
Street address:		
Postal address (if different):		
Phone:	Email:	
Tick here ☐ 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 ☐ for hardcopy delivery (fee applies)	

NAME OF FUND
Name of SMSF:
Please provide a copy of the current deed which is dated (dd/mm/yyyy):

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:

CURRENT 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 an SMSF has a maximum of 4 members.		

DETAILS OF EACH CONDITIONAL MEMBER TO BE ADMITTED TO THE FUND			
Each member is subject to the default condition below unless specified in the Special Instructions (on page 3)			
CM1 - Full name:		Name of dependant M2? ☐	
		T1? ☐	
Street address	Date of birth (dd/mm/yyyy)	Relationship to member Spouse? ☐	
		Dependant's percentage 100%? ☐	
CM2 - Full name:		Name of dependant M1? ☐	
		T2? ☐	
Street address	Date of birth (dd/mm/yyyy)	Relationship to member Spouse? ☐	
		Dependant's percentage 100%? ☐	
CM3 - Full name:		Name of dependant M4? ☐	
		T3? ☐	
Street address	Date of birth (dd/mm/yyyy)	Relationship to member Spouse? ☐	
		Dependant's percentage 100%? ☐	
CM4 - Full name:		Name of dependant M3? ☐	
		T4? ☐	
Street address	Date of birth (dd/mm/yyyy)	Relationship to member Spouse? ☐	
		Dependant's percentage 100%? ☐	
Default Condition: A current member or members, who hold greater than half of the market value of all member accounts in the Fund can either individually or collectively give the Member notice that they want the member to exit the Fund.			

If the conditional member has been provided full knowledge of the basis of their admission and the ability for them to be removed from the Fund, then the documents have a firm legal basis of withstanding legal challenge. However, the documents may still be subject to scrutiny by a court which may take a different view especially in a contested family law dispute.

Note that any member that is employed by another member or related entity must be a director of the employer-sponsor or a relative of such a director. Also, persons previously convicted of an offence involving dishonesty or who are bankrupt are disqualified from being admitted to an SMSF. Further, all members must generally be trustees or directors of the trustee company and all trustees or directors of the trustee company must be members of the Fund. Please note that the trustee structure must be amended before admitting a new member (s 17A(5) of the *Superannuation Industry (Supervision) Act 1993* (Cth)). Expert advice should be obtained if in doubt as severe penalties can be imposed for breach of the member/trustee rules. Please also complete a change of trustee order form if the trustees are individuals.

SPECIAL INSTRUCTIONS

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