



**The Incorporation People**  
A division of Corporate Representatives  
Pty Limited ABN 85 000 540 741

37 Gondola Road  
North Narrabeen NSW 2101

**Ph: 02 9999 3000**  
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## **SELF MANAGED SUPERANNUATION FUND - UPDATES**

Due to the many amendments to SIS Legislation and Regulations in recent years and in particular to changes that took effect from 1<sup>st</sup> July, 2007 it is important that a review be made of your clients trust deeds.

### **Such review should ensure that:**

- (a) The deed is worded in such a way as to include the legislative changes in the trust deed of the Fund.
- (b) The wording of the trust deed does not restrict the application of the legislative changes.
- (c) The provisions of the trust deed are not contrary to the SIS legislation & regulations.

### **Some of the matters to be considered in any review would include:**

- (a) The definition of "member"
- (b) Provisions relating to "contributions"
- (c) The types of Pension Benefits payable e.g. Allocated, Market Linked and Account Based.
- (d) Ability to pay Pension Benefits from within the fund.
- (e) Superannuation Splitting Arrangements.
- (f) Compliance with Family Law Act 1975.

Our legal advisers have prepared a trust deed to comply with the current SIS Regulations.

**A significant advantage in adopting the provisions of our updated trust deed** is that it includes in the interpretation clause a definition of Relevant Law which includes (SIS ACT and SIS Regulations) and by an appropriate use of such expression through the trust deed virtually brings into the trust deed all relevant provisions (both present and future) of the legislation. **This is obviously a clear advantage which will reduce substantially the necessity to have the trust deed amended every few years.**

We attach a Superannuation Trust Deed Amendment Order Form for your completion & return to this office with your current Trust Deed & other indicated information.

Our Update package includes two bound copies and one loose leaf copy of the trust deed plus trustee minutes & members consents fully completed with your advised details.

**Please phone us on (02) 9999 3000 if you wish to discuss the above matters.**



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**SUPERANNUATION TRUST DEED AMENDMENT ORDER FORM**

Adoption of New Provisions       Appointment of New Trustee/s

**Fund Name** \_\_\_\_\_  
**Setup Date** \_\_\_\_\_  
**Trustee Name/s** \_\_\_\_\_  
**Trustee ACN (if applicable)** \_\_\_\_\_  
**Trustee Address** \_\_\_\_\_  
**Principal Employer (if applicable)** \_\_\_\_\_  
**Members**      1) \_\_\_\_\_ 3) \_\_\_\_\_  
 (Full Names)    2) \_\_\_\_\_ 4) \_\_\_\_\_

**Change of Trustee (if applicable)**

**New Trustee Name** \_\_\_\_\_  
**New Trustee ACN** \_\_\_\_\_  
**New Trustee Address** \_\_\_\_\_

**For use of CorpReps only**

Clause No.	Delete Clauses	Insert Clauses

**Enclosed:**

- a) Company Extract of current Corporate Trustee       c) Copy of Trust Deed   
 b) Company Extract of new Corporate Trustee

ORDERED BY	PAYMENT DETAILS
<b>Company name</b>	<input type="checkbox"/> Bankcard <input type="checkbox"/> MasterCard <input type="checkbox"/> Visa Number
<b>Contact name</b>	Expiry date      Name
<b>Address</b>	<input type="checkbox"/> Direct deposit (Account details below. Please fax confirmation) CorpReps BSB 062287 A/c No. 10282947 Commonwealth Bank, Brookvale, NSW
<b>Phone/Fax</b>	<input type="checkbox"/> Bank cheque <input type="checkbox"/> Cash
<b>DELIVERY DETAILS</b>	
Personal collection <input type="checkbox"/> Courier <input type="checkbox"/>	<b>Please note: The person placing the order is responsible for payment of the account</b>