TAKE OVER ADMINISTRATION FORM

FUND DETAILS

Fund name _____

Mailing address _____
_____

Fund's ABN _____

Advisors Name: (if applicable) _____

Contact Name: _____

Phone (W): _____ Phone (H): _____

Fax: _____ Mobile: _____

Email: _____

MEMBER AND/OR INDIVIDUAL TRUSTEES

Title	_____	Title	_____
Full name	_____	Full name	_____
Physical address	_____	Physical address	_____
	_____		_____
DOB	_____	DOB	_____

Indicate with a cross if each person is a member and/or trustee
If a corporate trustee exists do not tick trustee box

☐ Member   ☐ Trustee   ☐ Member   ☐ Trustee

Corporate trustee (if applicable)

Company name _____

Registered address _____

ACN & ABN _____

PREVIOUS ADMINISTRATION

Name of Firm _____

Postal Address _____
_____

Phone: _____ Email: _____

APPOINT ADMINISTRATION

Envoy Super is to be appointed administrator of this SMSF.

AUTHORITY TO PROCEED

Please proceed with Envoy Super taking over administration of our SMSF. We/I have been supplied with the Envoy Super fee schedule. We/I understand that Envoy Super is not a licensed investment advisor and has not provided any investment advice in relation to setting up this SMSF.

Signed _____   Signed _____
            Trustee/Director   Trustee/Director

Please fax, email or post completed SMSF Application form to;
Post: Envoy Super, PO Box 67, Glass House Mtns QLD 4518
Email: admin@envoysuper.com.au
Fax: (07) 54 969 796

ENVOY SUPER
together we do more

DOCUMENT CHECKLIST

The following documents are required to complete appointment of administration:

* **Copy of current Trust Deed (including any deed of variations)**

* **Current Investment Strategy**

* **Previous Financial Accounts (including tax return & member statements)**

* **Fund's Tax File Number**

* **Members Tax File Number**

Corporate Trustee's Constitution (if applicable)

Any Setup document (if available)

Insurance policy documentation (if applicable)

Binding death nominations (if applicable)

Pension setup documents (if applicable)

Eligible Service Date of Member (if available)

Copies of meeting minutes (if available)

Copies of any ETP's and rollover documentation (if available)

* DOCUMENTS REQUIRED URGENTLY