

# **Superannuation Trust Deed for a Self-Managed Fund**

for

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## **The Evans Family Superannuation Fund**

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# The Evans Family Superannuation Fund

## Individual Trustee Declarations

I make the following declarations:

- I have not been convicted of an offence against or arising out of a law of the Commonwealth, a State, a Territory or a foreign country, being an offence in respect of dishonest conduct.
- I have not had a civil penalty order made against me under the *Superannuation Industry (Supervision) Act 1993*.
- I am not an insolvent under administration.
- I have not been disqualified under section 120A of the *Superannuation Industry (Supervision) Act 1993*.

Date:

27/4/2010

Signed:



Andrew James Evans

**Trustee**



# The Evans Family Superannuation Fund

## Individual Trustee Declarations

I make the following declarations:

- I have not been convicted of an offence against or arising out of a law of the Commonwealth, a State, a Territory or a foreign country, being an offence in respect of dishonest conduct.
- I have not had a civil penalty order made against me under the *Superannuation Industry (Supervision) Act 1993*.
- I am not an insolvent under administration.
- I have not been disqualified under section 120A of the *Superannuation Industry (Supervision) Act 1993*.

Date: 27/4/2010.

Signed: 

Dayna Lee Eastwell

**Trustee**



# The Evans Family Superannuation Fund


## Consent to Appointment as Trustee

I consent to being appointed a trustee of the The Evans Family Superannuation Fund.

Date:

27/4/2010.

Signed:



Andrew James Evans






# The Evans Family Superannuation Fund

## Consent to Appointment as Trustee

I consent to being appointed a trustee of the The Evans Family Superannuation Fund.

Date: 27/4/2010.

Signed:   
Dayna Lee Eastwell



**Execution**

Executed as a deed.

Dated: 27/4/2010

Signed sealed and delivered by Andrew James Evans, in the capacity of trustee, in the presence of:

*Daniel Vella*

Signature of witness

*Andrew James Evans*

Signature of individual

DANIEL VELLA

Name of witness (please print)

Signed sealed and delivered by Dayna Lee Eastwell, in the capacity of trustee, in the presence of:

*Daniel Vella*

Signature of witness

*Dayna Lee Eastwell* D.E.  
*DL*  
*AL*

Signature of individual

DANIEL VELLA

Name of witness (please print)



## Application to become a Member

This Application Form contains undertakings which must be made by you. It is also accompanied by the Product Disclosure Statement relevant to the fund contained in Annexure A.

### Part 1 Application and undertakings

- I apply to become an initial member of this fund under the trust deed.
- I make each of the following undertakings:
  - I am not in an employment relationship with another member.
  - I am not a disqualified person under superannuation law from being a trustee of the fund.
  - I will comply with the trust deed.
  - Upon request, I will fully disclose in writing any information required by the trustee in respect of my membership of the fund. This includes disclosing:
    - Any circumstance which may lead to my entering into an employment relationship with any other member of the fund who is not also a relative of mine.
    - That I may become disqualified under superannuation law from being a trustee of the fund.
    - Any information in relation to my medical condition.
- I will act as a trustee of the fund.
- I understand the trust deed, particularly its terms concerning the benefits payable under it, and I have read and understood the attached Product Disclosure Statement, annexed and marked 'A'.
- I have read and understand the prescribed information relating to the collection of Tax File Numbers by the trustees of superannuation funds.

I attach a completed ATO Individual Tax File Number Notification form.

Applicant name	Andrew James Evans
Applicant address	7 Azure Way, Coomera QLD 3209
Applicant occupation	Accountant
Date of birth	04 June 1974
Applicant place of birth	Cairns



## **Part 2 Death benefit arrangements**

This part of the member's application form is blank because the member elected to 'do nothing'. When they are ready, the member can consider:

- a death benefit nomination (either binding or non-binding); or
- a Death Benefit Agreement which is binding and "permanent" until the member replaces or revokes it.

In either case, the member;

- could prepare the form of those documents using the relevant pro-forma in the schedules to the Fund's deed (if they're comfortable doing so); or
- could order those documents from the person or organisation who arranged this document for them.






**Part 3 Provision of member's tax file number to regulated superannuation fund**

To the trustees of the The Evans Family Superannuation Fund.

I have been informed of the reasons why my TFN is sought by the fund.

My TFN is 183095310.

Date: 27/4/10

Signed:   
Andrew James Evans

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## **Important information about providing your tax file number (TFN) to the fund**

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**Under the *Superannuation Industry (Supervision) Act 1993*, the fund is required to request your TFN. Your TFN is confidential: you don't have to provide it.**

### **What your TFN may be used for**

If you provide your TFN, **it will be used for legal purposes only. The purposes for which your TFN may be used may change in the future. At present, they include:**

- searching for other benefits that may exist for you in the fund;
- calculating reduced tax rates on eligible termination payments (ETPS) when benefits are paid;
- reporting payments to ATO for reasonable benefit limits (RBL) purposes;
- reporting contributions to ATO for contributions tax (surcharge) purposes which may not otherwise be subject to the surcharge;
- passing to other regulated superannuation fund, ADFs and RSAs if your benefits are rolled over. You may revoke this authority later in writing;
- passing on with other details if you become lost and your benefits are paid to the ATO as unclaimed money.

### **What might happen if you don't provide your TFN**

If you do not provide your TFN, the following may happen:

- other benefits existing for you in the fund may be more difficult to locate and amalgamate;
- higher tax rates may apply to ETPs paid to you. (This may be recovered with lodgement of your next income tax return);
- your benefits may be subject to an extra 15% contribution tax (surcharge). This may be reclaimed on application to the ATO;
- your TFN will not be passed to other regulated superannuation funds, ADFs and RSAs if your benefits are rolled over;

your benefits may be more difficult to locate if benefits are paid to the ATO as unclaimed money.



**Annexure A**

**Product Disclosure Statement**

**The Evans Family Superannuation Fund**

Andrew James Evans

7 Azure Way

Coomera, QLD, 3209

***Here you need to attach a copy of the Product Disclosure Statement in Schedule 6 to the Deed.***



## Application to become a Member

This Application Form contains undertakings which must be made by you. It is also accompanied by the Product Disclosure Statement relevant to the fund contained in Annexure A.

### Part 1 Application and undertakings

- I apply to become an initial member of this fund under the trust deed.
- I make each of the following undertakings:
  - I am not in an employment relationship with another member.
  - I am not a disqualified person under superannuation law from being a trustee of the fund.
  - I will comply with the trust deed.
  - Upon request, I will fully disclose in writing any information required by the trustee in respect of my membership of the fund. This includes disclosing:
    - Any circumstance which may lead to my entering into an employment relationship with any other member of the fund who is not also a relative of mine.
    - That I may become disqualified under superannuation law from being a trustee of the fund.
    - Any information in relation to my medical condition.
- I will act as a trustee of the fund.
- I understand the trust deed, particularly its terms concerning the benefits payable under it, and I have read and understood the attached Product Disclosure Statement, annexed and marked 'A'.
- I have read and understand the prescribed information relating to the collection of Tax File Numbers by the trustees of superannuation funds.

I attach a completed ATO Individual Tax File Number Notification form.

Applicant name	Dayna Lee Eastwell
Applicant address	7 Azure Way, Coomera QLD 4209
Applicant occupation	Teacher
Date of birth	21 January 1977
Applicant place of birth	Maryborough





## **Part 2 Death benefit arrangements**

This part of the member's application form is blank because the member elected to 'do nothing'.  
When they are ready, the member can consider:

- a death benefit nomination (either binding or non-binding); or
- a Death Benefit Agreement which is binding and "permanent" until the member replaces or revokes it.

In either case, the member;

- could prepare the form of those documents using the relevant pro-forma in the schedules to the Fund's deed (if they're comfortable doing so); or
- could order those documents from the person or organisation who arranged this document for them.



**Part 3 Provision of member's tax file number to regulated superannuation fund**

To the trustees of the The Evans Family Superannuation Fund.


I have been informed of the reasons why my TFN is sought by the fund.

My TFN is 199743184.

Date:

27/4/2010.

Signed:



Dayna Lee Eastwell

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your benefits may be more difficult to locate if benefits are paid to the ATO as unclaimed money.



**Annexure A**

**Product Disclosure Statement**

**The Evans Family Superannuation Fund**

Dayna Lee Eastwell  
7 Azure Way  
Coomera, QLD, 4209

***Here you need to attach a copy of the Product Disclosure Statement in Schedule 6 to the Deed.***





# The Evans Family Superannuation Fund

## Instructions for use of Certificate of Compliance

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**Used when the member “rolls over” (transfers) benefits from another fund to the The Evans Family Superannuation Fund.**

### **What is the certificate for?**

If a member transfers money from another super fund into the member's SMSF, then the other fund may require one of these certificates.

### **What is certified?**

By signing the Certificate the trustee(s) of the Fund certifies that:

- 1 It is a regulated superannuation fund under the SIS Act;
- 2 It is a complying superannuation fund under the SIS Act;
- 3 It is not subject to a direction under Section 63 of the SIS Act; and
- 4 Its trust deed permits the receipt of rolled over or transferred benefits.

### **What should the trustee do before signing?**

**IMPORTANT:** Before the fund's trustee(s) sign the certificate they must make sure that:

- items 1-4 above are true; and
- the Fund must both have chosen to be regulated by the Australian Taxation Office (ATO) and have told the ATO of that choice — which the Fund does on the form used to apply for an ABN (Australian Business Number).

