

# SMSF Transfer Form

WE. SMSF

Download to complete as a PDF and click the submit button at the end to automatically email it back to us.  
You can also return the completed form to [Shaun@wesmsf.com.au](mailto:Shaun@wesmsf.com.au) or mail to PO Box 200 Maitland NSW 2320.

## SECTION A: MAIN CONTACT DETAILS

<b>Please note:</b> The person entered as Individual 1 below will be listed as the <b>main contact</b> for the Fund			
<b>I do not wish to receive any documents via an electronic signing platform</b>			
Please select an alternate/secondary method for delivery:		Email	<u>OR</u>
			Post

## SECTION B: FUND DETAILS (Tick whichever is applicable)

SMSF name			
ABN			
Trustee structure	Individual trustees	Corporate trustee (Complete company name and ACN below)	
Company name			ACN
<b>This fund has a corporate custodian/borrowing trust</b>			
Company name			ACN

## SECTION C: WE SMSF ADMINISTRATION SERVICE DETAILS

Financial year from which Heffron is taking over:			
<b>Administration package:</b>	Streamlined	Standard	Advanced
Is the SMSF registered for GST?	No		
	Yes – Reports and pays GST annually		
	Yes – Reports and pays GST quarterly (Additional fees apply)		
Would you like WE SMSF to act as the <b>mailing address</b> for the SMSF? (Additional fees apply - This relates to the mailing address for the Fund's investments only)			Yes
Would you like WE SMSF to become the <b>ASIC agent and registered office</b> for the corporate trustee? (Additional fees apply)			Yes
Would you like WE SMSF to become the <b>ASIC agent and registered office</b> for the corporate custodian? (Additional fees apply)			Yes

## SECTION D: PREVIOUS ADMINISTRATOR/ACCOUNTANT DETAILS

Contact person			Firm name		
Postal address					
Suburb			State		Postcode
Phone		Email			
<b>Note:</b> We recommend speaking to the previous accountant/administrator to inform them of the transfer to Heffron for SMSF Administration					

SECTION E: DETAILS OF MEMBER(S), TRUSTEES/DIRECTOR(S) ETC (Tick  whichever is applicable)

<b>INDIVIDUAL 1</b>		Member	Individual Trustee	Director (Corporate trustee)	Director (Corporate custodian)
Full <b>legal</b> name (First/Middle/Last)					
Title			Preferred Name (if different from First name)		
Gender	Male	Female	Other	Date of birth (dd/mm/yyyy)	
Residential address					
Suburb			State		Postcode
Postal address	As above				
Suburb			State		Postcode
Email					
Phone			Mobile		
<b>INDIVIDUAL 2</b>		Member	Individual Trustee	Director (Corporate trustee)	Director (Corporate custodian)
Full <b>legal</b> name (First/Middle/Last)					
Title			Preferred Name (if different from First name)		
Gender	Male	Female	Other	Date of birth (dd/mm/yyyy)	
Residential address					
Suburb			State		Postcode
Postal address	As above				
Suburb			State		Postcode
Email					
Phone			Mobile		
<b>INDIVIDUAL 3</b>		Member	Individual Trustee	Director (Corporate trustee)	Director (Corporate custodian)
Full <b>legal</b> name (First/Middle/Last)					
Title			Preferred Name (if different from First name)		
Gender	Male	Female	Other	Date of birth (dd/mm/yyyy)	
Residential address					
Suburb			State		Postcode
Postal address	As above				
Suburb			State		Postcode
Email					
Phone			Mobile		

<b>INDIVIDUAL 4</b>		Member	Individual Trustee	Director (Corporate trustee)	Director (Corporate custodian)
Full <b>legal</b> name (First/Middle/Last)					
Title			Preferred Name (if different from First name)		
Gender	Male	Female	Other	Date of birth (dd/mm/yyyy)	
Residential address					
Suburb			State		Postcode
Postal address	As above				
Suburb			State		Postcode
Email					
Phone			Mobile		
<b>INDIVIDUAL 5</b>		Member	Individual Trustee	Director (Corporate trustee)	Director (Corporate custodian)
Full <b>legal</b> name (First/Middle/Last)					
Title			Preferred Name (if different from First name)		
Gender	Male	Female	Other	Date of birth (dd/mm/yyyy)	
Residential address					
Suburb			State		Postcode
Postal address	As above				
Suburb			State		Postcode
Email					
Phone			Mobile		
<b>INDIVIDUAL 6</b>		Member	Individual Trustee	Director (Corporate trustee)	Director (Corporate custodian)
Full <b>legal</b> name (First/Middle/Last)					
Title			Preferred Name (if different from First name)		
Gender	Male	Female	Other	Date of birth (dd/mm/yyyy)	
Residential address					
Suburb			State		Postcode
Postal address	As above				
Suburb			State		Postcode
Email					
Phone			Mobile		

## **ACKNOWLEDGEMENT & AUTHORITY** By

submitting this form, you hereby:

- acknowledge that the trustee(s) or director(s) of the corporate trustee have read, understood, and agreed to the terms detailed in Heffron's [Privacy Policy](#),
- confirm that the information on this form is correct and I have the authority to request the services requested on behalf of the superannuation fund.