INTERVIEW AND DATA CAPTURE

ESTABLISHMENT OF SMSF DEED

Prepared for:

Dated:

1. **SUPERANNUATION FUND**

|  |  |
| --- | --- |
| **Name of SMSF** |  |

1. **TRUSTEE DETAILS**

**Individual Trustee**

|  |  |
| --- | --- |
| **Name of Trustee** | **Address of Trustee** |
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|  |  |
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**Corporate Trustee**

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| --- | --- |
| **Name of Trustee** |  |
| **ACN** |  |
| **Registered Office** |  |
| **Directors** |  |
|  |
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1. **MEMBER DETAILS**

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| --- | --- |
| **Name of Member** | **Address of Member** |
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|  |  |
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|  |  |
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1. **Voting Rules**

**Trustee voting details –**

*Circle Yes/No for the following questions –*

1. Does each trustee have proportional voting rights as per their balance? YES NO
2. Does each trustee get one vote each, with casting vote by Chairman? YES NO
3. Does the Chairman get the Tie-breaker vote in case of a tie? YES NO

**Member voting details –**

*Circle Yes/No for the following questions –*

1. Does each member have proportional voting rights as per their balance? YES NO
2. Does each member get one vote each, with casting vote by Chairman? YES NO
3. Does the Chairman get the Tie-breaker vote in case of a tie? YES NO