

Transfer of Real Property into a Self Managed Super Fund

Instruction Form

Adviser's Name:
 Delivery Address:



Brett Davies
L A W Y E R S
 Taxation & Superannuation
 201 Adelaide Terrace
 Perth Western Australia 6000
Phone (08) 9325 7999
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1. Is the commercial property currently in the name of a Family Trust?

- No** - the commercial property is in our own names. It isn't in any Family Trust
 I enclose a copy of the Offer & Acceptance or Contract of Sale – this proves that the commercial property is beneficially owned by the member of the Self Managed Super fund.
- Yes** – I enclose a copy of the Family Trust Deed, all variations and the last financials
 The current Trustee(s) of the Family Trust is
- I enclose a copy of the Offer & Acceptance or Contract of Sale – this proves that the commercial property is beneficially owned by the Family Trust (if you don't have that document then provide balance sheets that prove that the Family Trust owns the property).

2. I enclose a copy of the Commercial Properties title deeds. (Any mortgages, if any, are removed before the property is transferred into the Self Managed Super Fund.)

3. I enclose a copy of my Self Managed Superannuation Deed (and all variations) & latest financial statements.

4. The members of my Self Managed Superannuation Fund are:

1. 2
 3. 4

I have put a tick in front of the names of the persons who will own the property just before it is transferred into the Self Managed Super Fund. (The persons without a tick in front of their names are still members of the same Self Managed Super Fund but they will have not beneficial interest in the commercial property. They will still be trustee of the commercial property – but have no interest otherwise in the property.)

As a package we charge up to \$5,500 (including GST) to do this (this does not include government charges – which we estimate to be less than \$300). This includes:	and deal with any requisitions.
1. Full review and update of the Self Managed Superannuation Fund Deed. Including: PDS, increase powers to allow for the transfer pursuant to the Victorian and Western Australian Stamp Act, minutes and Investment Strategy pro-forma. This includes the Deed of Variation to amend the Self Managed Superannuation Fund Deed to comply with the Commissioner of State Revenue.	3. Declaration of Trust to say that: while the clients still hold the property in their own names they now hold it on trust for their Self Managed Super Fund. If you operate your Self Managed Super Fund via a company then there will be a transfer at the local titles office.
2. Arrange for stamping of the Deed of Variation	4. Arrange for stamping of the Declaration of Trust and deal with any requisitions.
	5. Prepare Caveat.
	6. Arrange for the Caveat and Declaration of Trust to be lodged at the local titles office.

Charge my credit card

Card Type B/Card Visa M/Card

Card #

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Name on Card

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Signature: