

Superannuation Passport Kit

Clients of:



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L A W Y E R S

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For your SMSF to be a 'complying fund' and receive concessional tax treatment, your SMSF must be an Australian resident fund. If you plan to holiday, spend time working overseas, or moving out of Australia permanently, don't put your SMSF at risk of losing its complying status. Get the Superannuation Passport Kit.

Name of Super Fund	
Fund Address	(only 1 address is required for all members. This may be the Advisers address)
Trustee(s)	<input type="checkbox"/> All the members below are trustees <input type="checkbox"/> Company _____
Member 1	
Member 2	
Member 3	
Member 4	

Who will look after your SMSF when you are overseas (Attorney)?

Member who is going overseas	
Attorney's Full Name (you can only appoint 1 person as your Attorney)	
Attorney's Address (residential address – not Post Office Box address)	

I Enclose (tick box):

- The Self-Managed Superannuation Fund Deed
- All variations of the Self-Managed Superannuation Fund Deed (if any)
- The last financials of the Self-Managed Superannuation Fund Deed (if any)

Brett Davies Lawyers:

1. Reviews your Self-Managed Super Fund Deed (and any variations) to ensure it allows for Enduring Powers of Attorney.
2. Prepares a Deed of Variation for the SMSF to provide the Trustee with the power to appoint an Attorney, acknowledge the appointment of an Attorney and confirm the status quo if the Funds membership.
3. Prepares a SIS complying Power of Attorney for the Member going overseas.
4. Prepares a Deed of Indemnity and Guarantee.
5. Prepares a letter of advice on the operation of the Superannuation Passport Kit.

Cost: \$1,500 (inclusive of GST) (as of 9 November 2009)

Charge my credit card Card Type Visa M/Card

Card #																			
Name on Card													Expiry	/20__					

or

Cheque enclosed for \$1,500

(This is an expense of the Superannuation Fund)

Please fax to Brett Davies Lawyers on 08 9325 5999, or post to:
Brett Davies Lawyers, Reply Paid 1116, 201 Adelaide Terrace, Perth, 6000.