



**Economy Trust Deed package
for a NEW self-managed super fund**

Please complete and return to Superannuation Australia

ORDER PLACED BY

PLEASE PRINT CLEARLY

Your name

Member number (if applicable)

Name of your firm (if applicable)

Address for delivery

Telephone number

Facsimile number

DETAILS OF FUND

Name of fund

TRUSTEE

Individuals* OR Company** How many members?

*If individual trustee: minimum 2 trustees, maximum 4 and minimum 1 member, maximum 4

**If a company trustee: minimum 1 member, maximum 4

Commencement date

PRODUCT DISCLOSURE STATEMENTS (PDS):

The Corporations Act 2001 requires a PDS to be given in the following instances:

- When a new member joins a Self Managed Superannuation Fund (SMSF)
- When an existing member commences a pension in a SMSF.

However section 1012D(2A) exempts SMSF trustees from this requirement where they believe on reasonable grounds that the member "...has received, or has and knows that they have access to all of the information that the PDS would be required to contain".

Do you require a PDS? Yes No

THIS MUST BE SIGNED BY A PROPOSED TRUSTEE OF THE FUND

Name Signed

The format of the Economy Trust Deed package enables you to complete the schedule to the Deed and supporting papers yourself. You will be supplied with comprehensive guidance notes to provide you with a wealth of information so you can complete the Deed and supporting papers and apply for registration with the Tax Office.