



**D. THE SUPERANNUATION FUND:**

Fund Name:

Fund ABN:

Provide details of current Trustee(s) of the Fund including name(s) and address(es). If Trustees are individuals, provide dates of birth. If Trustee is a company, provide names of all directors

For Minutes of Meeting purposes, the date and address where and when the parties resolved to transfer the property

Date

(leave blank if not yet known)

DD/MM/YYYY

Address:

If there is more than one member transferring, what is the relationship between each of the members:

Is the Fund registered for GST?

No

Yes

See accompanying Information Notes - Transfers of Land to SMSFs

Has the Fund paid any amount to any member/transferrer or to any other person in respect of the transfer?

No

Yes

If Yes, provide details below

Is the transfer part of a sale or other arrangement under which there exists consideration or value given for the transfer?

No

Yes

If Yes, provide details:

**E. PROPERTY TRANSFER INFORMATION:**

Have the parties sought advice from their accountant/financial advisers regarding their superannuation balances and how much they can contribute to the Fund?

No

Yes

Have the parties sought advice from their accountant/financial advisers regarding the CGT and GST consequences, if any, associated with the property?

No

Yes

*If you have answered No to either of the above questions, no steps should be taken by the parties to transfer the property until that advice has been sought and provided*

Effective date of transfer:

DD/MM/YYYY

*The transfer date may have CGT and other implications. It is from this date that the Trustee as new owner is entitled to receive the rent. To avoid rental apportionment, it would be convenient to make the transfer date on which rental is paid.*

What is the value of the property?

\$

What proportion of the property is being transferred – whole or only part of it?

If part only, what proportion?

In relation to the property, is the member(s) registered for GST?

No

Yes

If Yes, ABN:

See accompanying Information Notes - Transfers of Land to SMSFs as applicable

Contributing Member details

1<sup>st</sup> Contributing Member 's Full Name:

Address

Gender:

male:

female:

Date of Birth:

DD/MM/YYYY

Non- Concessional Contribution Value: \$

Concessional Contribution Value: \$

