



Our work will include:

- A. Deed of Partial Vesting out of the Family Trust to the beneficiaries, and appropriate minutes and Transfer of Land documents.
- B. Full review and update of the SMSF Deed.  
Including: PDS, increase powers to allow for the transfer pursuant to the Western Australian Duties Act, minutes and pro-forma Investment Strategy. This includes the Deed of Variation to amend the SMSF Deed to comply with the Commissioner of Office State Revenue (**OSR**) requirements.
- C. Arrange for stamping of the Deed of Variation and deal with any requisitions. Appropriate letter to OSR explaining the transactions
- D. 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 SMSF. If you operate your SMSF via a company (what we recommend) then there will be a Transfer of Land lodged at Landgate, and a Deed of Purchase prepared.
- E. Arrange for stamping of the Declaration of Trust and deal with any requisitions.
- F. Prepare Transfer of Land and Lodgement with Landgate
- G. Prepare Caveat if required and arrange for the Caveat and Declaration to be registered.

**CLIENT:**

Signed by You:  Date: \_\_\_/\_\_\_/\_\_\_

Full name(s)  ACN

Our address is:

Contact: W:  F:  M:  H:

**Charge my credit card**

Card Type  B/Card  Visa  M/Card

Card #

Name on Card  Expiry  /20\_\_

or **Cheque enclosed**

or **Monies electronically transferred/deposited into below accounts for our fees:**

MURFETT LEGAL PTY LTD REGULATED TRUST ACCOUNT (St George Bank)

BSB No: 336-060 A/C No: 553-391-865 – please quote **SMSF and YOUR NAME** – when depositing funds

**ADVISER:**

ACCOUNTANT /  FINANCIAL PLANNER

Full name(s)

Address is:

Contact: W:  F:  M:  H: