

# n. panos & associates

*solicitors*

Phone: 02 9687 3755  
Fax: 02 9687 3750

Principal: **Nicholas Panos**  
Bec, LLB (Hons)  
LLM, F.T.I.A.  
Acc. Spec. (Tax.)

## GENERAL SELF MANAGED SUPERANNUATION FUND SCHEDULE

### 1. Fund

Name of Fund	
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### 2. Trustee Details

*If individual trustee*

Full Name/s	
Address	
Relationship	

*If company trustee*

Company Name	
ACN	
Registered Address	
Directors Full Name/s	
Address	
Relationship	
Is it a sole director company?	<b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/>

### 4. Members Details

	Member 1	Member 2
Full Name		
Address		
Date of Birth		

Employer		
Occupation		
Relationship		

**5. Will the Fund be a self managed super fund and therefore, regulated by the ATO?**

**Yes**                       **No**

For a self managed super fund each trustee (or each director in the case of a corporate trustee) must be a member and each member must be a trustee (or a director in the case of a corporate trustee). No member can be an employee of another member unless the members concerned are relatives. In the case of a single member fund, if the trustee is a company the member must be the sole director or the member is one of only two directors and the member and the other director are related or the member is not an employee of the other director. If the trustees are individuals the member is one of only two trustees and the other trustee is a relative of the member or the member is not an employee of the other trustee. A fund will not be a self managed super fund if a member is employed by an employer-sponsor of the fund, and another member (who is not a relative) has a specified interest in that employer-sponsor.