

SMSF TRANSFER FORM



Complete and return this form to Heffron at: clientsupport@heffron.com.au OR PO Box 200 Maitland NSW 2320

SECTION A: FUND DETAILS

Fund Name			
Financial year from which Heffron is taking over administration			
ABN		TFN	

SECTION B: HEFFRON ADMINISTRATION SERVICE DETAILS

Fund Package Type	Streamlined	Standard	Advanced
GST Registration			
Is the Fund registered for GST?	No	Yes, Quarterly	Yes, Annually
Mailbox Service – only applicable if we are to act as the mailing address for the Fund	Yes, Mailbox		

SECTION C: TRUSTEE DETAILS

Individual				
Corporate	Name		ACN	
Registered Office Address				
Suburb		State		Postcode
Would you like Heffron to be the ASIC Agent and Registered Office	Yes		No	
INDIVIDUAL 1	Director	Trustee	Member	
Full Legal Name			Title	
Date of Birth		TFN		
Residential Address				
Suburb		State		Postcode
Postal Address	As above			
Suburb		State		Postcode
Email				
Phone			Mobile	
INDIVIDUAL 2	Director	Trustee	Member	
Full Legal Name			Title	
Date of Birth		TFN		
Residential Address				
Suburb		State		Postcode
Postal Address	As above			
Suburb		State		Postcode
Email				
Phone			Mobile	

NOTE: If there are more than two individuals, please copy this page

SECTION D: CORPORATE CUSTODIAN DETAILS (if applicable)

Corporate Custodian	Name		ACN	
Registered Office Address				
Suburb		State		Postcode
Would you like Heffron to be the ASIC Agent and Registered Office	Yes		No	
INDIVIDUAL 1	Director	Same as Individual 1 above		
Full Legal Name			Title	
INDIVIDUAL 2	Director	Same as Individual 2 above		
Full Legal Name			Title	

NOTE: If there are more than two individuals, please copy this page

SECTION E: PREVIOUS ADMINISTRATOR / ACCOUNTANT DETAILS

Contact Person		Company Name		
Postal Address				
Suburb		State		Postcode
Phone		Email		
Note: We recommend speaking to the previous accountant/administrator to inform them of the transfer to Heffron for SMSF Administration				

SECTION F: PRIVACY STATEMENT

Heffron SMSF Solutions is committed to protecting the privacy and rights of its customers. Our [Privacy Policy](#) contains important information about how we collect, hold, use and disclose personal information. If you have questions or wish to make a complaint, please contact our Privacy Officer at Heffron SMSF Solutions, PO Box 200, MAITLAND NSW 2320, or via email at privacy.officer@heffron.com.au.

SECTION G: ACKNOWLEDGEMENT

I confirm that the information on this form is correct and I have the authority to request the services requested on behalf of the superannuation fund.

Signature of person authorised to make the above statements on behalf of the member(s) and trustee(s) or director(s) of the corporate trustee

Print name

Date