



Do your SMSF documents stand up to scrutiny?

More and more SMSF disputes are arising because of gaps in or inadequate SMSF documents, in particular trust deeds, variations, changes of trustee, binding death benefit nominations and pension documents.

This is reflected in cases such as *Perry v Nicholson* and *Re Narumon*, where parties were forced to court to confirm the validity of SMSF documents. In both cases, the court action would not have been necessary with better documentation.

For a fixed fee of \$1,100 incl. GST, Cooper Grace Ward will review and provide a written report identifying shortcomings with your SMSF documents and how to fix them:

- trust deeds, deed variations and changes of trustee
- binding death benefit nominations
- pension documents.

Will your SMSF document survive the test?

Contact a member of our SMSF team for more information.



Scott Hay-Bartlem
Partner
T +61 7 3231 2458
E scott.hay-bartlem@cgw.com.au



Clinton Jackson
Partner
T +61 7 3231 2451
E clinton.jackson@cgw.com.au



Hayley Mitchell
Partner
T +61 7 3231 2935
E hayley.mitchell@cgw.com.au



Steven Jell
Senior Associate
T +61 7 3231 2992
E steven.jell@cgw.com.au