SMSF HEALTH CHECK



NAME OF FUND:		
TRUSTEE/MEMBER:		
DATE COMPLETED:		
The purpose of the SMSF Estate plan is to ensure the surviving SMSF trustees or the replacement trustees (Legal Personal Representatives) have specific instructions from each member as to their wishes should a death event occur. Many trustees falsely assume their superannuation benefits will automatically be paid to their estate on death. This is not the case! With an increasing amount of wealth ending up into SMSF's it's vital each member clearly articulates their SMSF estate plan to the trustees. Trustees can now create a SMSF WILL inside their SMSF trust deed and governing rules.		
So we can understand what the current instructions are for each member, please provide a brief response to the following questions:		
 As a member of the fund have you provided written instructions to the trustees outlining your estate planning instructions? If so list below. 		
2. What is important to you in the event of your sudden death?		
3. What is important in look	king after your family financially upon your death?	
4. Who do you want to allo	cate your member's super benefit in the event you pass away? And in the	
	riving spouse (if applicable) pass away together? (Adult children, Minor	

5.	Do you have an ex-spouse or children from a previous marriage/relationship?
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6.	For business owners what happens to the share ownership in the corporate business? What would you want to see happen?
7	Wayld you be interested in receiving further training advection materials in any of these areas?
7.	Would you be interested in receiving further training education materials in any of these areas?
8.	General Comments:

Thank you for taking the time to complete this SMSF Health Check form. Your feedback is greatly appreciated.

Please email this completed document to **adam@yoursupersolutions.com.au** or fax (02) 4455 6520. For any queries, please contact Adam Passwell on **1300 389 839.**