

Office use only

## Self-Managed Invest (SMI) - Change of account details

Please complete Section 1 of this form with your existing SMI SMSF account details.  
Section 9 must be signed by the appropriate authorised signatories.

You may complete any other sections relevant to the changes you wish to make.  
Please leave all other sections blank if no changes are required.



**How to use:** This form allows you to make the following changes to your SMI SMSF account:

### Section 2:

- [Change of bank details](#)

### Section 3:

Change of SMSF Trustee/Director contact details, including:

- [Change of email address](#)
- [Change of mobile number](#)
- [Change of residential address](#)
- [Change of mailing address](#)

### Section 4:

Change of existing SMSF Trustee/Director details, including:

- [Change of name](#)
- [Change of authority level](#)

### Section 5:

Change of SMSF Trustee/Director, including:

- [Add new Trustee/Director](#)
- [Remove existing Trustee/Director](#)

### Section 6:

Change of SMSF Corporate Trustee SMI fund contact details, including:

- [Change of registered address](#)
- [Change of mailing address](#)

### Section 7:

Change of SMSF fund details, including:

- [Change of SMSF name](#)
- [Change of SMSF ABN](#)
- [Change of Company details \(Corporate Trustee structure\)](#)

### Section 8:

- [Amendments related to a Deceased Estate](#)



**Note:** Changes to financial advisers and third-party authorities can be made via the *Self-Managed Invest – appointment or change of Financial Adviser Form*.

## 1 Account details

Account name (i.e. name of fund)

SMI Investor number

Email address

Contact telephone (if mobile drop the 0)

+	6	1	<input type="text"/>
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## 2 Change SMSF bank account details

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### Change SMSF bank account details

Complete the below details to change your SMSF bank account.

Please note that Hostplus does not accept third party payments. The bank account name must be in the name of the SMSF and must be an Australian bank account.

Account name\*

Bank or Financial Institution name\*

BSB\*

Bank account number\*

## 3 Change of SMSF Trustee/Director contact details

Please provide new contact details (address/email/phone number)

Full name of Director/Trustee

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### Change my residential address



No PO BOX address allowed/accepted

Street address

Suburb

State

P/C

☐

### Change my postal address (if different from your residential address)

Street address

Suburb

State

P/C

☐

### Change my email

My new email

☐

### Change my phone number

My new phone number/s:

Home phone

Mobile phone

Work phone

## 4 Change of existing SMSF Trustee/Director details

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### Change my name

As part of the identification process you will need to enclose certified copies of identification outlined below:

1. **One primary photographic ID document (drivers license or passport); or Two secondary documents (Australian birth certificate or citizenship certificate or pension card plus a document issued by the Commonwealth or ATO, local government body or utility).**

**AND**

2. **One of the following 'linking documents'.**

A linking document is a document that proves a relationship exists between two (or more) names:

- Marriage Certificate from the Registry of Births, Deaths, and Marriages
- Divorce Certificate/deed from the Federal Circuit and Family Court of Australia
- Deed poll or change of name certificate from the Registry of Births, Deaths and Marriages
- Notice of Tax assessment from the Australian Taxation Office issued within the previous 12 months (if you are correcting your name ONLY)

We will not be able to update your details if you have not provided the required documents as per above.

### Update my name to:

Given names

Surname

☐

### Change authority level

☐

Account authority (can transact on behalf of the trustee), OR

☐

Information only access

## 5 Change of SMSF Trustee/Director

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### Remove an Individual Trustee

Full name of Trustee to be removed from this SMI account

To remove a trustee of an SMSF with an individual trustee structure, you must provide, along with this form, the updated Trust Deed, a Deed of Retirement/Removal, trustee meeting minutes noting the decision, a Deed of Appointment for the replacement trustee, and a Declaration by the new trustee to accept the role.

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### Remove a Director

Full name of Director to be removed from this SMI account

To remove a director of an SMSF with an corporate trustee structure, you must provide, along with this form, formal Director's Resignation or Removal Notice, and a signed Trustee or Director's Resolution documenting the removal.

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### Remove a Corporate Trustee

Full name of Trustee to be removed from this SMI account

To remove the corporate trustee of an SMSF, you must provide, along with this form, the new Deed of SMSF Trust, the minutes of the meeting where the removal was decided, ASIC documentation confirming the change in directors, and a Certificate of Compliance.

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### Add an Individual Trustee: Individual trustee SMSF structure

Complete the details on the following page to add an individual Trustee to this SMI account.

Title

☐ Mr ☐ Mrs ☐ Ms ☐ Dr  Other

Full name

Email address

Contact telephone (if mobile drop the 0)

 +  6  1 

Date of Birth

Address

Suburb

State

P/C

Date of Birth

Authority level

☐ Account authority (can transact on behalf of the trustee). OR

☐ Information only access

To add a new trustee to an SMSF with an individual trustee structure, you must provide, along with this form:

- The new trustee or director must formally consent in writing to their appointment. This can be documented in meeting minutes or a signed consent.
- A copy of the updated fully executed Trust Deed.

OR

- An extract of the executed page of the Trust Deed that includes:
  - Full Trust name
  - Date established
  - Full names of all beneficiaries and signatures
  - Names of witnesses and signatures
- A certified copy of the individual Trustee drivers' licence or passport
- A certified copy of the individual Trustee secondary identification documents (Australian birth certificate or citizenship certificate or pension card plus a document issued by the Commonwealth or ATO, local government body or utility)

### ☐ Add a Director - Corporate trustee structure

Complete the below details to add a Director to this SMI account.

Title

☐ Mr ☐ Mrs ☐ Ms ☐ Dr  Other

Full name

Email address

Contact telephone (if mobile drop the 0)

 +  6  1 

Date of Birth

Address

Suburb

State

P/C

Authority level

☐ Account authority (can transact on behalf of the trustee). OR ☐ Information only access

To add a new Director to an SMSF with a corporate trustee structure, you must provide, along with this form:

- A certified copy of the Directors drivers' licence or passport
- A certified copy of the Directors secondary identification documents (Australian birth certificate or citizenship certificate or pension card plus a document issued by the Commonwealth or ATO, local government body or utility)
- The director must formally consent in writing to their appointment. This can be documented in meeting minutes or a signed consent
- A copy of the updated fully executed Trust Deed

## 6 Change of SMSF Corporate Trustee SMI fund contact details

Complete the below details to change your SMSF corporate trustee company address details.

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### Change my SMSF corporate trustee company address details



No PO BOX address allowed/accepted

Street address

Suburb

State

P/C

☐

### Change my SMSF corporate trustee company postal address details

Street address

Suburb

State

P/C

You'll also need to provide, along with this form:

- Board or trustee meeting minutes confirming the address change
- Updated company records showing the new address
- Confirmation of ASIC update (e.g. receipt or updated company extract)

## 7 Change of SMSF fund details

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### Change of SMSF Name and ABN details (Individual Trustee structure)

Complete the below details to change your SMSF fund name and/or SMSF ABN

Fund

Full name of Fund\*

Australian Business Number (ABN)\*

Registered office address (PO Box not acceptable) including country

Australian Principal place of business address (PO Box not acceptable) including country

You'll also need to provide, along with this form:

- ASIC certificate of registration showing the new SMSF name and ABN
- Board or trustee meeting minutes confirming the change
- Updated trust deed

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### Change of Company Name and ABN details (Corporate Trustee structure)

Complete the below details to change your SMSF fund name and/or SMSF ABN.

Company details

Full name of company\*

Company type

Australian company number (ACN)\*

Australian business number (ABN)

Foreign equity for tax purposes

Registered office address (PO Box not acceptable) including country

Australian Principal place of business address (PO Box not acceptable) including country

## 7 Change of SMSF fund details (con't)

You'll also need to provide, along with this form:

- Certified copy of the updated trust deed or certified extract from their Trust Deed detailing the Directors of the SMSF
- If Proprietary, provide details of how many directors there are plus their full names and DOB provide details of the beneficial owners (full names plus residential addresses)
- ASIC certificate of registration showing the new company name
- Board or trustee meeting minutes confirming the change

## 8 Amendments related to a Deceased Estate

### Instructions

Please note, an SMSF with individual trustees must have at least two trustees linked unless a corporate trustee is appointed.

Depending on the Trust, please submit instructions advising whether a new trustee will be appointed or to remove a deceased trustee only along with the relevant documents below.

#### If removing a deceased trustee only

Please provide the following:

- this form completed, including section 5
- a certified copy of the death certificate
- a certified copy of the deed of variation signed by all remaining Trustees

#### If appointing a replacement individual as trustee

Please provide the following:

- this form completed, including section 5
- a certified copy of the deed of variation showing the change of trustee signed by all Trustees (include minutes of meeting)
- a certified copy of identification for each new trustee

#### If appointing a corporate as trustee

Please provide the following:

- this form completed, including section 7
- a copy of the updated ASIC extract showing newly appointed director(s) - include minutes of meeting (If ASIC has not been updated a certified copy of death certificate)
- a certified copy of identification for each new director

**By submitting this form I confirm that:**

- The SMSF SMI account details/numbers listed in Section 1 are complete and correct
- I am an Account Authority for this SMSF, and
- I authorise Hostplus to make the changes documented in this form

As well as signing this form you'll need to provide a certified copy of your identification (e.g. driver licence, passport or government-issued proof of age card).

**Trustee/Director Signatures****Trustee/Director Signature One**

Given names

I, Surname 

Solemnly declare that the information I have provided is true and correct to the best of my knowledge.

Signature of Trustee/Director\*

Date\*

**Trustee/Director Signature Two**

Given names

I, Surname 

Solemnly declare that the information I have provided is true and correct to the best of my knowledge.

Signature of applicant\*

Date\*



If signed under Power of Attorney: Attorneys must attach a certified copy of the Power of Attorney if not already supplied.

The Attorney hereby certifies that he/she has not received notice of any limitation or revocation of his/her Power of Attorney and is also authorised to sign this form.



Please send the completed form to Hostplus SMI GPO Box 764, Melbourne VIC 3001.

If you have any questions, call us on **1300 350 819** Monday to Friday between 8am – 8pm (AEST) or visit [hostplus.com.au/smi](https://hostplus.com.au/smi)

Hostplus collects personal information, including sensitive information, in order to administer your superannuation account and provide you with associated services and support. If you do not provide us with the information requested, we may not be able to carry out your instructions or provide the services or assistance you require. The Hostplus Privacy Policy is available on the Hostplus website at [hostplus.com.au/privacy](https://hostplus.com.au/privacy) or by calling us on **1300 467 875**. The policy explains how we handle your personal and sensitive information, how you can access and/or seek correction of your personal information and how you can make a complaint about a breach of your privacy.