

Your SMSF setup documents

The setup documents for your fund depend on its trustee structure.
Use the table below to check the paperwork for your fund.

Document	Corporate trustee	Individual trustee
Trust deed and articles	✓	✓
Fund establishment minutes	✓	✓
Application/confirmation of membership	✓	✓
ATO trustee consents and declarations	✓	✓
Product Disclosure Statement	✓	✓
ABN / TFN applications	✓	✓
Investment strategy and minutes	✓	✓
Death benefit minutes	✓	✓
Employer letter	✓	✓
Admin direct debit form	✓	✓
ATO direct debit form	✓	✓
Appointment of party minutes (Administrator and Tax Agent)	✓	✓
Applicable TPAs (third party account authorities)	✓	✓
Corporate trustee establishment documents	✓	—
ASIC agent minutes	✓	—

KEY ✓ Applies — Does not apply