

Transfer of ownership – Statutory Declaration for SMSF

Individual Trustees

We, (Individual Trustees' Names),

do solemnly and sincerely declare that:

- a. We were appointed as Individual Trustees of the (Scheme Name)

(the 'Fund'),

in accordance with the governing rules of the Fund, effective from (Date (DD/MM/YYYY));

- b. a true copy of the Deed effecting our appointment as trustee of the Fund is attached to this statutory declaration;

- c. the policy owner of Acenda policy number (Policy Number)

('Policy')

holds the Policy as the former trustee of the Fund; and

- d. we request(s) that the above Policy be transferred to us under section 203 of the *Life Insurance Act 1995* (Cth).

We make this solemn declaration conscientiously believing the same to be true and by virtue of the provisions in the *Oaths Act 1900* (NSW).

Declared at: (Place)

on: (Date (DD/MM/YYYY))

(Signature of Declarant)

(Date (DD/MM/YY))

(Signature of Declarant)

(Date (DD/MM/YY))

in the presence of an authorised witness, who states:

I, (name of witness),

a (qualification of authorised witness),

certify the following matters concerning the making of this statutory declaration by the person who made it:
(*please cross out any text that does not apply)

- *I saw the face of the person **OR** *I did not see the face of the person because the person was wearing a face covering, but I am satisfied that the person had a special justification for not removing the covering, and
- *I have known the person for at least 12 months **OR** *I have confirmed the person's identity using an identification document and the document I relied on was (name of identification document relied on)

(Signature of authorised witness)

(Date (DD/MM/YY))

Send us your form

Please mail your completed, signed and dated form to:

Acenda

Operations

PO Box 23455

Docklands VIC 3008

Email: enquiries.retail@acenda.com.au

If you have any questions you can call us on **13 65 25** Monday to Friday, 8.30am to 5pm (AEST/AEDT).