

RELATIONSHIP BREAKDOWN:

PAYMENT SPLIT DOCUMENTATION SERVICE

Complete and return this form to Heffron at: technical@heffron.com.au OR PO Box 200 Maitland NSW 2320

Document inclusions:

Notices to each party to the split, additional information for the recipient of the splittable payment, instructions to the Trustee(s) from the recipient of the splittable payment and confirmation notices to each party (as required by superannuation law) together with Trustee resolution(s).

SECTION A: ACCOUNTANT/ADVISER DETAILS

Contact Person		Company			
Postal Address					
Suburb		State		Postcode	
Phone		Email			
Mobile Phone		Cc Email			
Please select how you would like to receive the documents			Email	OR	Post
Please select who should receive the documents			Accountant/Adviser	OR	Trustee 1

SECTION B: FUND & TRUSTEE DETAILS

Fund Name		ABN	
Individual Trustees			
Individual 1 (Full legal name)			
Individual 2 (Full legal name)			
Individual 3 (Full legal name)			
Individual 4 (Full legal name)			
Corporate Trustee			
Company Name			
Director 1 (Full legal name)			
Director 2 (Full legal name)			
Director 3 (Full legal name)			
Director 4 (Full legal name)			
Fund mailing address			

Heffron Consulting Pty Ltd ABN 88 084 734 261 AFS License No.: 241 739

SECTION C: COURT ORDER/SUPERANNUATION AGREEMENT

<p>Date the court order/superannuation agreement was served on the Trustee(s)</p> <p><i>The operative time for the payment split (ie the date the payment split is required to occur) is often determined by reference to this "served" date.</i></p>	
<p>Date the splittable payment(s) was actually made/will actually be made</p> <p><i>The Family Law Act requires interest at a statutory rate to be applied to the splittable payment amount if it has been/will be made <u>after</u> the operative time. If necessary, we will calculate this amount.</i></p>	

SECTION D: INFORMATION OT ATTACH

As part of your request, please attach:

- Copy of the **final** court order/superannuation agreement
- Current trust deed of the Fund.

NOTE: We may also require financial statements (including member statements) for the SMSF at a particular date. If required, we will advise you once we have examined the court order/superannuation agreement.

SECTION E: DETAILS OF SPLITTABLE PAYMENT

Provide the following details for **each** splittable payment that has been/will be made pursuant to the court order/superannuation agreement. **Copy this page if there is more than one payment split.**

Member from whom the splittable payment is being taken (Full legal name)			
Recipient of the payment split amount (Full legal name)			
Recipient's date of birth			
Recipient's postal address			
How will the splittable payment be effected?	Transferred within the SMSF		
	Transferred to <i>another</i> complying superannuation fund		
	Fund name		
	ABN		
	Recipient's member/account number		
	Contact phone		
	Fund address		
	Cashed out as a lump sum payment		
	<i>This is only possible if the splittable payment includes unpreserved \$, or the recipient themselves has satisfied a condition of release that allows them to cash out the splittable payment as a lump sum payment</i>		

SECTION F: PAYMENT

We charge on a time-cost basis for the documentation at an hourly rate of \$484 including GST (see document inclusions outlined above). As an **indication only**, our fees generally range from around \$1,100 to \$2,500 (fees are generally at the higher end of the estimated range in cases where, for example, an amount is to be split from each spouse rather than from just from one spouse, the details of the payment split are complex, time is expended obtaining complete information from the relevant parties or consulting time is expended assisting the Trustee(s)/Advisor/Accountant at the drafting stage of the court order/superannuation agreement).

Heffron will issue an invoice once to documentation work has been completed. The invoice is payable 14 days from date of invoice (payment options will be outlined on the invoice).

Note also that the court order/superannuation agreement may require, for example:

- a member to cease their membership of the SMSF,
- an individual's cessation as an individual trustee/director of a corporate trustee,
- or the transfer of a shareholding in a corporate trustee, or in a corporate bare trustee of a limited recourse borrowing arrangement.

Heffron can also assist you with the **additional** documentation to deal with these matters (if necessary). We will advise what, if anything, is required once we have examined the court order/superannuation agreement and provide an additional quote for the cost of such documentation.

SECTION G: DECLARATION/AGREEMENT

The trustee(s) or director(s) of the corporate trustee hereby:

- declare that the information provided on this form is true and correct
- instruct Heffron to prepare the documentation outlined above as the "Document inclusions" for each split prescribed by the court orders or superannuation agreement and agree to pay for the preparation of the documentation on a time-cost basis at an hourly rate of \$484 including GST.

Signature of person authorised to make the above declaration/instruction/agreement on behalf of the trustee(s) or director(s) of the corporate trustee

Print name

Date

SECTION H: PRIVACY STATEMENT

Heffron SMSF Solutions is committed to protecting the privacy and rights of its customers. Our [Privacy Policy](#) contains important information about how we collect, hold, use and disclose personal information. If you have questions or wish to make a complaint, please contact our Privacy Officer at Heffron SMSF Solutions, PO Box 200, MAITLAND NSW 2320, or via email at privacy.officer@heffron.com.au.