

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))*;

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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 MLC Life Insurance 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))*

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(Signature of Declarant)

(Date (DD/MM/YY))

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(Signature of Declarant)

(Date (DD/MM/YY))

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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))

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Send us your form

Please mail your completed, signed and dated form to:

**MLC Life Insurance
Operations
PO Box 23455
Docklands VIC 3008**

Email: enquiries.retail@mlcinsurance.com.au

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