

Members - AU

The **Members** tab displays current and former self-managed super fund (SMSF) members..

To add a Member

1. Select a client on **My List** and click **Corporate admin**.
2. Click the **Members** tab.
3. Under **Members**, click **Add member**. The **Search for member** field appears.
4. Enter the name of a contact to add as a member.

or

Click **Create new contact** and fill in the details.

Members register

The **Members register** lists all current and former members and details, including:

- the **Start date**, when the member was first appointed
- the **End date**, where the member ceased
- the **Type** of member — corporate or individual
- the **Address** of the member.

To maintain an accurate history of members, you can add the details of former members as a historical entry.

To add a historical entry to the Members register

1. Click **Add historical entry** located at the end of the **Members register**. The **Search for member** field appears.
2. Enter the name of the member and click on their name to add,
or
Click **Create new contact**, fill in their details and click **Add member**.