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DDO TEMPLATES & RESOURCES



The FSC has created a range of resources to assist our members with the Design Distribution & Obligations (**DDO**). Click the headings below to view more information on the resource you require.

The FSC has released a new version of its Target Market Determination (**TMD**) template for funds management, superannuation choice products (master trusts), superannuation wraps, IDPSs and managed accounts.

Please note: from **1 July 2024**, FSC TMD templates will be licensed to **members only**. Please contact Member Services to discuss becoming a member via membership@fsc.org.au (<mailto:membership@fsc.org.au>).

Please see the infographic and explainer video in *Other Resources* below for further information.

- ▶ [TARGET MARKET DETERMINATION \(TMD\) TEMPLATES \(2025\)](#)
- ▶ [DATA STANDARDS](#)
- ▶ [DISTRIBUTOR DUE DILIGENCE QUESTIONNAIRE \(DDQ\)](#)
- ▶ [GUIDANCE ON APPLYING DDO TO LIFE INSURANCE AND MANAGED FUNDS](#)
- ▼ [OTHER RESOURCES](#)

TMD TEMPLATE LICENSING ARRANGEMENTS

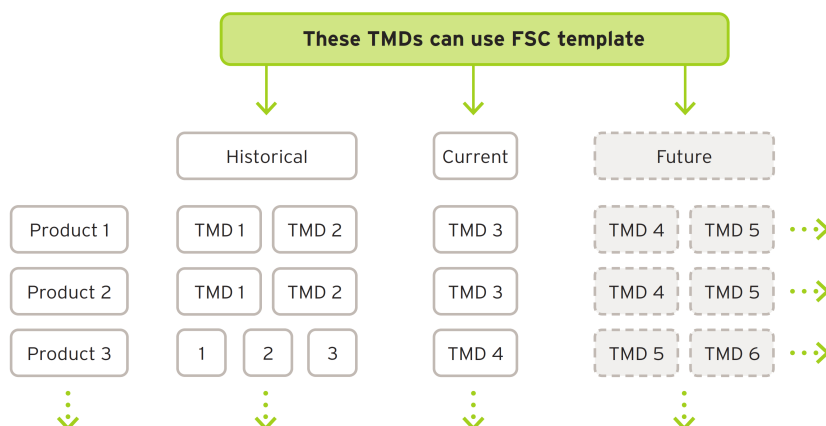
Target Market Determination (TMD) Template Licensing Arrangements



The FSC's Target Market Determination (TMD) template licensing arrangements are changing for licensee businesses on 1 July 2024.

FSC Member

All FSC members are able to use TMD templates for historical, current and future TMDs.



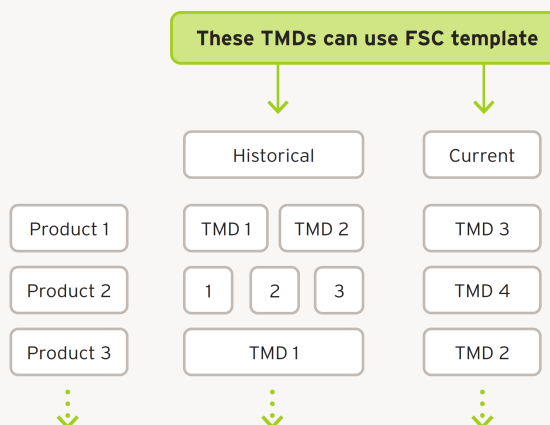
FSC Non-member Licensee

If a business is not a Member, but currently licenses the FSC's TMD templates now, then the business can continue to use the TMD templates for TMDs until **30 June 2024** – but not after.

From **1 July 2024** all TMDs issued by businesses that had licensed the FSC templates must not use the FSC templates unless they join the FSC.

If you are currently a licensee business and would like to continue using the FSC's TMD templates from **1 July 2024**, please contact the FSC to discuss becoming a member via info@fsc.org.au.

Up to 30 June 2024

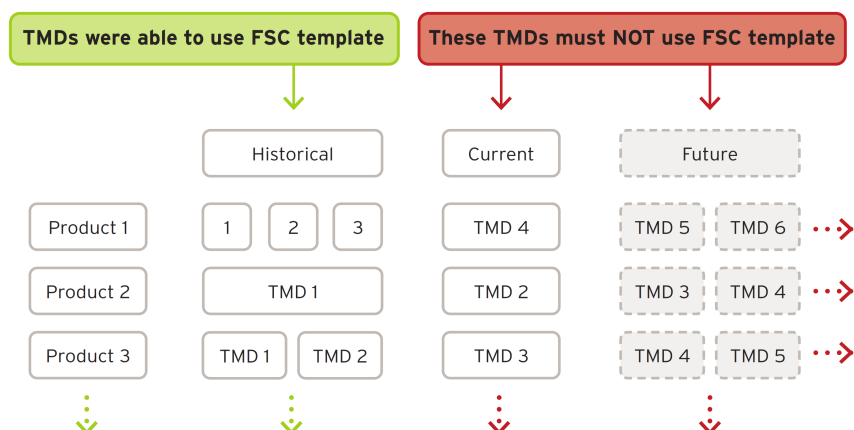


FSC Non-member/ Previously a Licensee

From **1 July 2024**, all TMDs issued by previous non-member licensee businesses, must not use the FSC templates. Licensee businesses must ensure they do not issue TMDs using the FSC template and all TMDs using the FSC template are limited to historical TMDs. The business may keep these historical templates publicly available.

The business must ensure all TMDs using the FSC template are historical TMDs on or before **1 July 2024**. The business may keep these historical templates publicly available, but they should not be the current version of the TMD template for the relevant products.

From 1 July 2024



TMD EXPLAINER VIDEO



TMD explainer video

FinServCouncil



Watch on

MEDIA RELEASES

- 8 July 2021 - [Industry collaborates to produce design and distribution obligations templates 1.0](https://fsc.org.au/resources/2225-fsc-media-release-industry-collaborates-to-produce-design-and-distribution-obligations-templates-1-0/file) (https://fsc.org.au/resources/2225-fsc-media-release-industry-collaborates-to-produce-design-and-distribution-obligations-templates-1-0/file)
- 7 June 2023 – [FSC promotes regulatory best practice on Design and Distribution Obligations](https://fsc.org.au/resources/2625-fsc-media-release-fsc-promotes-regulatory-best-practice-on-ddo/file) (https://fsc.org.au/resources/2625-fsc-media-release-fsc-promotes-regulatory-best-practice-on-ddo/file)

ARCHIVE

Old versions of DDO templates and data standards are here. These documents are for reference only and should not be used.

- [FSC template TMD for funds, version 1.0](https://fsc.org.au/web-page-resources/2165-fsc-tmd-template-funds-management) (https://fsc.org.au/web-page-resources/2165-fsc-tmd-template-funds-management) (archived – not for use)
- [DDO Data Standards – Word version v 1.3](https://fsc.org.au/web-page-resources/2241-fsc-ddo-data-standards) (https://fsc.org.au/web-page-resources/2241-fsc-ddo-data-standards) (archived – not for use)
- [DDO Data Standard for Target Market Determinations for managed funds – Excel version of template v1.3](https://fsc.org.au/web-page-resources/2262-ddo-data-standard-for-target-market-determinations-excel-version-of-template-managed-funds) (https://fsc.org.au/web-page-resources/2262-ddo-data-standard-for-target-market-determinations-excel-version-of-template-managed-funds) (archived – not for use)

WATCH FOR UPDATES

The templates may be updated over time and it is worth bookmarking the Resources page.

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