

Service	Description	Fee	
		Electronic (soft copy)	Hard copy
Fund establishment	<p>Our Fund Establishment Kit includes everything you need to get your SMSF up and running:</p> <ul style="list-style-type: none"> • Comprehensive and highly flexible SMSF Trust Deed • Member packs (including application forms, proforma Product Disclosure Statements and binding death nomination forms) and • Relevant letters, minutes & templates (including a sample fund investment strategy) 	\$485	\$535
Corporate trustee incorporation	We can facilitate the incorporation of a company to act as trustee of your SMSF, or as holding trustee for your SMSF Borrowing Arrangement.	\$880 (including ASIC fee)	\$930 (including ASIC fee)
Trust Deed Upgrade	<p>Ensure your trust deed remains up to date and complies with all current superannuation legislation. Our Upgrade Kit includes:</p> <ul style="list-style-type: none"> • all relevant letters, minutes and templates • the latest Trust Deed 	<p>\$220 if upgrading from a SuperConcepts Trust Deed</p> <p>\$330 if upgrading from an external Trust Deed</p>	<p>\$270 if upgrading from a SuperConcepts Trust Deed</p> <p>\$380 if upgrading from an external Trust Deed</p>
SMSF Borrowing Arrangement - Property only	<p>A fully integrated, flexible and comprehensive SMSF borrowing arrangement documentation service for property which includes:</p> <ul style="list-style-type: none"> • Written resolutions to establish the arrangement and appoint the Holding Trustee • Holding Trust Deed (Bare Trust) • Detailed information pack, including guidelines for conveyancers • Stamping pack • Lease pack • Loan agreement and mortgage documentation (related party loans) • Step by step completion instructions 	<p>\$1,540 Related Party Lender</p> <p>\$880 Commercial Lender</p>	<p>\$1,590 Related Party Lender</p> <p>\$930 Commercial Lender</p>
SMSF Borrowing Arrangement - Non property	For borrowing arrangement documentation other than for property.	Please contact us	

This fee schedule is current as at 1 April 2018 and is subject to change. All fees quoted include GST.

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		Electronic (soft copy)	Hard copy
Fund restructure	Any changes to your fund (e.g. new fund name, adding or removing trustees, replacing individual trustees with a corporate trustee, etc.) must be properly documented to meet legislative, regulatory and audit requirements. We provide: <ul style="list-style-type: none"> • Appropriate minutes, letters and consents • ATO and ASIC notifications as required 	Not available	\$110 for each change
Pension commencement	Our documentation caters for Account Based, Transition to Retirement and Market Linked (Complying) pensions and includes: <ul style="list-style-type: none"> • minimum/maximum pension calculations • all relevant letters and minutes • Pension Agreement; and • Centrelink Schedule 	Not available	\$440
Pension commutation	The provision of all necessary documents to convert an existing pension back to accumulation within the fund or to a lump sum payment.	Not available	\$220
Pension commutation and restart	The full package for pensioners wishing to start a new pension based on their combined pension and accumulation balances.	Not available	\$550
Lump sum withdrawal/ Rollover	Formalises the withdrawal or rollover of amounts from your SMSF.	Not available	\$110
Documentation reissue	Re-issue copies of existing documentation.	\$0 if original documents were provided electronically otherwise \$55	\$110

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