

Service	Description	Fee
Electronic (soft 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) 	\$650
Corporate trustee incorporation	We can facilitate the incorporation of a company to act as trustee of your SMSF.	\$990 (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>\$374 if upgrading from a SuperConcepts Trust Deed</p> <p>\$484 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"> • Trustee Resolution • Member Resolution • Property Trust • Agency Agreement • Bare Trust Deed <p>Addition of holding trustee company for your SMSF Borrowing Arrangement</p>	<p>\$1,540 Related Party Lender</p> <p>\$880 Commercial Lender</p> <p>\$990</p>

Hard copy delivery of documentation incurs an additional \$50 charge.

This fee schedule is current as at 1st November 2023 and is subject to change. All fees quoted include GST.

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Electronic (soft 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 	\$275
Pension commencement	Our documentation caters for Account Based, Transition to Retirement and Market Linked (Complying) pensions and includes Pension Agreement and all relevant letters and minutes	\$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.	\$220
Pension commutation and restart	The full package for pensioners wishing to start a new pension based on their combined pension and accumulation balances.	\$550
Documentation reissue	Re-issue copies of existing documentation.	\$0 if original documents were provided electronically otherwise \$110

Hard copy delivery of documentation incurs an additional \$50 charge.

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Mailing address
GPO Box 9981
Adelaide SA 5001

Phone 1300 023 170
Email trusteeservices@superconcepts.com.au
Website superconcepts.com.au



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