

PAYG PRICE LIST

Create Legal Documents

SMSF Document	Member Type	PAYG \$ (incl. GST)
Company Incorporation <ul style="list-style-type: none"> Standard Special Purpose 	Create Legal	\$634 ¹ \$689 ¹
Constitution upgrade <ul style="list-style-type: none"> Standard to Special Purpose Special Purpose to Standard 	Create Legal	\$330
SMSF Establishment (incl. QROPS)	Create Legal	\$220
SMSF Deed Upgrade (incl. QROPS)	Create Legal	\$220
SMSF Change of Trustee	Create Legal	\$330
SMSF Change of Name	Create Legal	\$330
Limited Recourse Borrowing Arrangement (LRBA)	Create Legal	\$660
LRBA Loan Facility Agreement (related party)	Create Legal	\$330
LRBA Refinance	Create Legal	\$660
Unit Trust (<i>coming soon</i>) <ul style="list-style-type: none"> Standard SISR 13.22C 	Create Legal	\$330
In-house Asset Loan Agreement	Create Legal	\$330
Deed of Debt Forgiveness (<i>coming soon</i>)	Create Legal	\$330
Death Benefit Nomination <ul style="list-style-type: none"> Binding DBN (lapsing & non-lapsing) Non-binding DBN 	Create Legal	\$165
Add BDBN as a Paramount Document	Create Legal	\$99
Fund Member's Guardian	Create Legal	\$275

All SMSF legal documents have been drafted and are maintained by solicitor and co-founder of Smarter SMSF, Ian Glenister, LLB SSA.

¹ Includes ASIC fee of \$488 effective 1 July 2018

SMSF Pension Documents

SMSF Document	Member Type	PAYG \$ (incl. GST)
Pension Commencement <ul style="list-style-type: none"> Account Based Pension Transition to Retirement Income Stream Death Benefit Pension 	Create	\$198
Partial Commutation <ul style="list-style-type: none"> Cash In-specie 	Create	\$220
Lump Sum <ul style="list-style-type: none"> Cash In-specie Death Benefit 	Create	\$99
Rollback of Pension <ul style="list-style-type: none"> Account Based Pension Transition to Retirement Income Stream 	Create	\$198
TRIS to Retirement Phase	Create	\$132
Pension Deed of Affirmation & Confirmation <i>(coming soon)</i>	Create	\$220
Convert TRIS to ABP ²	Create	\$165
Annual Pension Review <i>including above minimum pension amounts</i>	Create	\$99
Add ABP as a Special Rule of the Fund	Create	\$99
Minimum Pension Shortfall	Create	\$99
Met condition of release	Create	\$55
Add or remove a reversionary beneficiary	Create	\$99
Audit confirmation of benefits paid	Create	\$55
Payment of Reversionary Pension	Create	\$99
Deemed Segregation Period (DSP) <i>(coming soon)</i>	Create	\$99

² Due to the ATO's current interpretation of converting a TRIS to ABP, these documents are currently unavailable for use pending further clarification. Should you wish to convert a TRIS to ABP, you can complete a pension rollback and pension commencement, which when used together achieve a similar result, or alternatively move a TRIS to the Retirement Phase. Further clarification is being sought from the Australian Taxation Office.

Legacy Pension Documents

Death Benefit Pension Rollover (per PCG 2017/6)	Create	\$132
TRIS Reg 995.1.03 election <i>(applies pre 1 July 2017 only)</i>	Create	\$165
Transfer Balance Cap – Full Commutation (per PCG 2017/5)	Create	\$132
Transfer Balance Cap – Partial Commutation (per PCG 2017/5)	Create	\$132

SMSF Compliance Documents

SMSF Document	Member Type	PAYG \$ (incl. GST)
Investment Strategy	Create	\$165
Change allocation of Investment Strategy	Create	\$55
Contribution Reserving <ul style="list-style-type: none"> Concessional Contributions Non-Concession Contributions 	Create	\$165
Downsizer Contributions <i>(coming soon)</i>	Create	\$99
Member contributions <ul style="list-style-type: none"> Cash In-specie 	Create	\$55
Contribution splitting	Create	\$55
Satisfy work test	Create	\$55
Met Condition of Release	Create	\$55
Notice to vary LRBA interest rate	Create	\$55
Acquire an Asset Minute	Create	\$55
Dispose of an Asset Minute	Create	\$55
Certificate of Complying Status	Create	\$55
Audit confirmation of employer contributions	Create	\$55
Trustee Consent <ul style="list-style-type: none"> Director Individual 	Create	\$55

SMSF Document	Member Type	PAYG \$ (incl. GST)
Add or remove a member	Create	\$99
Winding up a SMSF Minutes	Create	\$220
Creation of a Reserve <i>(coming soon)</i>	Create	\$132
Allocation from a Reserve	Create	\$132
Returning Non-Concessional Contributions (due to not meeting work test)	Create	\$99

Legacy Compliance Documents

CGT Relief – apply using segregated method	Create	\$132
CGT Relief – apply using proportionate method	Create	\$132

Unlicensed Accountant Letters	Member Type	PAYG \$ (incl. GST)
Pension Commencement	Create Comply	N/A
Annual Pension Review including above minimum pension	Create Comply	N/A
Partial Commutation	Create Comply	N/A
Lump Sum	Create Comply	N/A
Fund Establishment	Create Comply	N/A
Investment Strategy	Create Comply	N/A
Death Benefit Nomination	Create Comply	N/A

* These unlicensed accountant letters (Create Comply) are currently only available under a monthly or annual subscription.



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