

smarter smsf documents

LEGAL

- Company Incorporation (Standard)
- Company Incorporation (Special Purpose)
- Change of Constitution
- Company Constitution only
- New SMSF (incl. QROPS) - incl. ABN integration (NEW)
- SMSF Deed Upgrade (incl. QROPS)
- SMSF Change of Trustee
- SMSF Change of Trustee - Death of a Member
- SMSF Change of Trustee - Incapacity *
- Changes to Directors (incl. removal with incapacity & death)
- SMSF Change of Name
- Lost Trust Deed
- Fixed Unit Trust
- Limited Recourse Borrowing Arrangement (LRBA)
- LRBA Loan Facility Agreement (Related Party)
- LRBA Refinance (related party)
- In-house Asset (IHA) Loan Agreement
- Deed of Debt Forgiveness *
- Deed of Rectification *
- Binding & Non-Binding Death Benefit Nominations
- Fund Member's Guardian
- Add or remove a Fund Member
- Add Enduring Power of Attorney (Special Rule of the Fund)

SMSF COMPLIANCE

- Investment Strategy
- Investment Strategy Review Statement
- Investment Strategy - Single asset or asset concentration minute
- Rollovers In (SuperStream compliant)
- Rollovers Out (SuperStream compliant)
- Contribution Reserving - CC & NCCs
- ECPI choice minute
- Downsizer Contributions (from age 55)
- Member contribution (cash and in-specie)
- Contribution splitting
- Satisfy work test & work test exemption (pre 1 July 2022)
- Property use declaration & market valuation minute
- Notice to vary LRBA interest rate
- Acquire an Asset Minute
- Dispose of an Asset Minute
- Certificate of Complying Status
- Audit confirmation of employer contributions
- Trustee Consent - Director
- Trustee Consent - Individual
- Winding up a SMSF
- Creation of a Reserve *
- Allocation from a Reserve
- Family law split minutes *

PENSION & LUMP SUMS

- Met Condition of Release
- Pension Commencement (ABP, TRIS & Death Benefit Pension, including starting with an unknown balance)
- Partial Commutation (Cash & in-specie)
- Lump Sum (Cash & in-specie)
- Rollback of Pension (ABP & TRIS)
- TRIS to Retirement Phase
- Lost Pension Deed (Affirmation & Confirmation)
- Election for above minimum pension amounts
- Add ABP as a Special Rule of the Fund
- Minimum Pension Shortfall
- Met condition of release
- Add or remove a reversionary beneficiary
- Audit Confirmation of Benefits Paid
- Payment of Reversionary Pension
- Temporary Incapacity Income Stream
- Death of a Member *
- Market Linked Pension (MLP) *
- MLP Commutation *
- Commutation of Defined Benefit Pension *

UNLICENSED ACCOUNTANT LETTERS

- Pension Commencement
- Annual Pension Review (including above minimum pension election)
- Partial Commutation
- Lump Sum
- Fund Establishment
- Investment Strategy
- Death Benefit Nomination
- SuperStream Rollovers
- Contribution (as part of tax planning)

Access to the unlicensed accountant letters is only available under the Smarter SMSF document subscriptions.

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