

| 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) | \$485 |
| 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 • Death Benefit Nomination Form | \$350 if upgrading from a SuperConcepts Trust Deed \$450 if upgrading from an external Trust Deed |
| 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> | \$1540 Related Party Lender \$880 Commercial Lender \$990 |

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

This fee schedule is current as at 1st October 2022 and is subject to change. All fees quoted include GST.

| Service | Description | Fee |
|--|--|--|
| 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 | \$249 |
| 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 \$55 |

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

This fee schedule is current as at 1st October 2022 and is subject to change. All fees quoted include GST.

Mailing address
GPO Box 9981
Adelaide SA 5001

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



© SMSF Administration Solutions Pty Ltd ABN 76 097 695 988 (trading as SuperConcepts)