



If you have subscribed to one of our [fixed fee SMSF packages](#), many of the items in this price list are included in that subscription (either for free or at a reduced rate) and as such, most of this price list is relevant only for those SMSF's that are not on a fixed fee plan.

All prices below are purely for the provision of the below documents / services based on information provided to us by you (or based on the information contained within your SMSF at the time) and do not include any associated advice or services, particularly financial advice.

Description	\$ (incl GST)
<b>SMSF Setup, Deeds, &amp; Upgrades</b>	
- Superannuation Fund with individual trustees	770
- Superannuation Fund + Sole Purpose SMSF Trustee Company	1555
- SMSF Deed Upgrade / Amendment	440
- SMSF Change of Name	440
- SMSF Change of Trustees (incl. ATO forms)	275
- Conversion of Existing Company to Sole Purpose SMSF Trustee	440
- Conversion of Indiv. Trustees to Sole Purpose Company Trustee (incl. new company)	990
- Regulation 13.22C Trust	POA
- Superannuation Unrelated Investment Unit Trust	POA
- Limited Recourse Borrowing Agreement + Bare Trust + Mortgage Deed	POA
<b>Accounting &amp; Audit Services</b>	
- Bookkeeping / Accounting (incl. Circular Resolution approving the financial statements)	POA
- Audit	POA
- Preparation of Tax Return from Audited Financials (incl. Circular Resolution)	220
- Preparation and Lodgment of a "Contravention Report" (where the ATO requires the auditor to lodge because the SMSF is in breach of the rules)	330
<b>Supply of Documentation to assist with Compliance</b>	
- Circular Resolution (sample only)	Free
- Any of the following documents each (35% discount for 4 or more in one year): Contribution Advice; Pension Application; Pension Commutation Request; Lump-Sum Withdrawal Application; Investment Strategy; Binding Death Benefit Nomination; "Intent to Claim" Personal Contributions Form; Superannuation Benefit Transfer Request; Partially Commute Pension and Take In-Specie Payment; Creation of a Reserve; Allocations to or from a Reserve; Declaration of Trust	99
- Creation of a Contribution Reserve Account + Allocations of Contributions in July to avoid breaching contribution caps	POA
<b>SMSF's with Pensions</b>	
- Annual Application for an Actuarial Certificate (reqd. by Law for SMSF's paying pensions except if entirely in "pension mode" for entire year - one per SMSF regardless of number of pensions being paid)	220
<b>SMSF's with Property</b>	
- Estimation of Value (automatically calculated by computer - suitable for year end valuations) - <i>Residential Only</i>	165
- "Desktop" Valuation (suitable for pension calculations)	330
- Commercial Lease Agreement	330
<b>Government "Super Stream" Requirements (compulsory for all SMSF's)</b>	
- MCA's One-Off Registration Fee	55
- Annual Registration Fee (billed by Australia Post)	approx. 10 per annum