Sladen Legal drives results

Self Managed Superannuation Fund (SMSF) price list

SMSF deeds	
New SMSF deed	$440
Update of SMSF deed (volume discounts apply)	$550
SMSF constitutions	
SMSF company incorporation	$765
Constitution upgrade	$550
SMSF corporate trustees stakeholders agreement	
This agreement has been designed to assist in succession planning and control for an SMSF corporate trustee. It includes powers to appoint and remove directors and to deal with shareholders, as well as the incorporation of a guardian role.	$990
SMSF borrowing (LRBAs)	
Bank lender (documents only) *Includes bare trust deed, deed of directions and relevant minutes.*	$1,210*
Bank lender (premium package) *Includes bare trust deed, deed of directions, relevant minutes, up to 1 hour of consultation time, stamping of the bare trust deed, arrangements involving up to 4 assets and a review of the bank loan and security documents.*	$2,420
Related party lender (documents only) *Includes bare trust deed, deed of directions, related party loan agreement, relevant minutes and preparation of mortgage.*	$1,650*^
Related party lender (premium package) *Includes bare trust deed, deed of directions, relevant minutes, related party loan agreement (Division 7A if applicable), up to 1 hour of consultation time, stamping of the bare trust deed, lodging of the mortgage, and arrangements involving up to 4 assets. Excludes any Titles Office lodgement fees, eg. for mortgages.*	$3,850
Incorporation of custodian/bare trustee *Incorporation of new company to act as bare trustee/custodian.*	$765 *per company.*
Additional bare trusts for additional assets (bulk discounts available)	$440 *for each additional bare trust.*
Death benefits	
Standard binding death benefit nomination (BDBN)	$550 *for one.* *$660 for two.*
Payment of super benefits *This package empowers a member's attorney to pay the member's super benefits should they become incapacitated.*	$2,200
Trustee	
Change of trustee	$440
Change of trustee and transfer of real property as a result of change of trustee *Includes deed and relevant minutes, statutory declaration of new trustee, statutory declaration of old trustee, transfer documentation and arranging for stamping and lodgement of transfer documents. Excludes any Titles Office lodgement fees e.g. for transfer documents, any dealings with the State Revenue Office. GST deeds, verification of identity and CGT clearence certificates.*	$3,300

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Information sheet

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Change of SMSF name	
Change of SMSF name	$440
Pensions and lump sums	
Account based pension	$440 *for one.* $550 *for two.*
Transition to retirement income stream	$440 *for one.* $550 *for two.*
Life interest pension *This pension provides that the income of the pension will be paid to the death benefit pensioner/ reversionary pensioner during their life and that the capital of the pension will, upon the death of the pensioner/reversionary, be paid to the original member's legal personal representative or dependants. Excludes customised variations to the SMSF deed to prevent the arrangement being unwound.*	$1,650
Pension conversion	$440
Pension commutation	$440
Lump sum payments	$440
Investment strategies and reserves	
Investment strategy	$400
Creation of a contributions reserve	$400
Creation of an investment reserve	$400
SMSF wind up and rollovers	
SMSF wind up	$550
SMSF rollover	$440
Distribution and contribution of real property	
Distribution of real property from unit trust to unit holders *Includes review of unit trust deed, preparation of distribution resolutions, transfer documentation, relevant notices, statutory declaration and arranging for stamping and lodgement of the transfer. Excludes any variations required to the unit trust deed or unit holding discretionary trust deed and Titles Office lodgement fees e.g. of the transfer documents, any dealings with the State Revenue Office. GST deeds, verification of identity and CGT clearence certificates.*	$3,300
Distribution of real property from discretionary trust to beneficiaries *Includes review of discretionary trust deed, preparation of distribution resolutions, transfer documentation, relevant notices, statutory declaration and arranging for stamping and lodgement of the transfer. Excludes any variations required to the discretionary trust deed and Titles Office lodgement fees e.g. of the transfer documents, any dealings with the State Revenue Office. GST deeds, verification of identity and CGT clearence certificates.*	$3,300
Contribution of real property from individual to SMSF *Includes review of SMSF deed, preparation of contribution resolutions, transfer documentation, relevant notices, statutory declaration and arranging for stamping and lodgement of the transfer. Excludes any variations required to the SMSF deed and Titles Office lodgement fees e.g. of the transfer documents, any dealings with the State Revenue Office. GST deeds, verification of identity and CGT clearence certificates.*	$3,300
Other SMSF specific matters	
Requests to reallocate or disregard of excess contributions	POA
Requests for SMSF specific advice	POA
Dealing with ATO audits, assessments and objections	POA

All prices are inclusive of GST

*Stamping of the bare trust deed is an additional $500 and for arrangements involving more than one asset, add $400 for each additional asset

^Lodging of the mortgage is an additional $200 (plus Titles Office lodgement fees) and Division 7A compliant loan agreement is an additional $200

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