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Self Managed Superannuation Fund (SMSF) price list

SMSF deeds	Standard Price	Sladen Smart Price
New SMSF deed	\$550	\$495
Update of SMSF deed (volume discounts apply)	\$660	\$594
SMSF constitutions		
SMSF company incorporation	\$938	\$839
Constitution upgrade	\$660	
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 (premium package) <i>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.</i>	\$2,640	\$2,376
Related party lender (premium package) <i>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.</i>	\$4,400	\$3,960
Incorporation of custodian/bare trustee <i>Incorporation of new company to act as bare trustee/custodian.</i>	\$938 <i>per company.</i>	\$839 <i>per company.</i>
Death benefits		
Standard binding death benefit nomination (BDBN)	\$660 <i>for one.</i> \$770 <i>for two.</i>	
Payment of super benefits <i>This package empowers a member's attorney to pay the member's super benefits should they become incapacitated.</i>	\$2,750	\$2,475
Trustee		
Change of trustee	\$660	\$594
Change of trustee and transfer of real property as a result of change of trustee <i>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 clearance certificates.</i>	\$4,400	

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Change of SMSF name	Standard Price	Sladen Smart Price
Change of SMSF name	\$550	
Pensions and lump sums		
Account based pension	\$550 for one. \$660 for two.	\$495 for one. \$594 for two.
Transition to retirement income stream	\$550 for one. \$660 for two.	\$495 for one. \$594 for two.
Pension conversion	\$550	
Pension commutation	\$550	
Lump sum payments	\$550	
Reserves		
Creation of a contributions reserve	\$440	
Creation of a contributions strategy	\$440	
Creation of an investment reserve	\$440	
SMSF wind up and rollovers		
SMSF wind up	\$660	
SMSF rollover	\$550	
Distribution and contribution of real property		
Distribution of real property from unit trust to unit holders <i>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 clearance certificates.</i>	\$4,400	
Distribution of real property from discretionary trust to beneficiaries <i>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 clearance certificates.</i>	\$4,400	
Contribution of real property from individual to SMSF <i>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 clearance certificates.</i>	\$4,400	
Other SMSF specific matters		
Requests for SMSF specific advice	POA	
Dealing with ATO audits, assessments and objections	POA	
Advice in relation to super, tax, duty and succession strategies and compliance requirements	POA	

All prices are inclusive of GST