

Superannuation borrowing arrangements price list



Price list from 1 July 2021

Cooper Grace Ward's specialist superannuation team includes four SMSF Specialist Advisors™, who together have extensive experience in SMSF advice and commercial services.

Having counselled on numerous super borrowing transactions, Cooper Grace Ward understands the major compliance and practical issues and can assist you in getting the transaction through while fully complying with the technical super borrowing rules.

We offer two options to assist clients purchasing property using a superannuation fund borrowing arrangement (LRBA).

	Option 1 Documents only	Option 2 Documents and advice
Special purpose trust deed (bare trust)	✓	✓
Legal opinion confirming trust deed compliance with section 67A of the SIS Act	✓	✓
Legal opinion confirming proposed transactions comply with section 67A of the SIS Act	✗	✓
Review purchase contract and confirm compliance with section 67A of the SIS Act	✗	✓
Total fees	\$1,320 *	\$3,300 *

Optional extras

Establish corporate trustee for bare trust #	Add \$820 including ASIC fees
Establish corporate trustee for SMSF #	Add \$820 including ASIC fees
Establish new SMSF #	Add \$429
Update of existing SMSF trust deed	Add \$495
Related party leases	From \$1,100 *
Related party loan documents	From \$1,650

* outlays (e.g. search fees of \$15 - \$50) not inclusive | # prepared by CGW Structures, an affiliated entity

Depending on circumstances, these fees may not be applicable. If necessary, we will give clients a more accurate

quote when we receive full instructions. All prices are inclusive of GST.

Our key contacts

If you would like any further information, please contact one of our SMSF Specialist Advisors™, who can assist you with your queries.



Scott Hay-Bartlem

Partner

T 61 7 3231 2458

E scott.hay-bartlem@cgw.com.au



Clinton Jackson

Partner

T 61 7 3231 2451

E clinton.jackson@cgw.com.au



Hayley Mitchell

Partner

T 61 7 3231 2935

E hayley.mitchell@cgw.com.au



Steven Jell

Senior Associate

T 61 7 3231 2992

E steven.jell@cgw.com.au



Keeghan Silcock

Associate

T 61 7 3231 2920

E keeghan.silcock@cgw.com.au

About Cooper Grace Ward

With more than 20 partners and 200 team members, Cooper Grace Ward is a leading Australian law firm based in Brisbane, servicing clients with a local, national and international presence.

As a full service firm, we are known for providing commercial and practical advice, outstanding client service and excellence in our chosen practice areas. We provide a full range of services through key workgroups – commercial, family law, insurance, litigation and dispute resolution and property, planning and environment – enabling us to meet all of our clients' business needs.