

Adviser services



Price list from 1 July 2021

Superannuation funds

Deed update (wholesale replacement)		\$495
Change of trustee (no stamping) plus stamping	\$110	\$495 \$605
Deed update (wholesale replacement) plus change of trustee in one document (no stamping) plus stamping	\$110	\$715 \$825
Superannuation borrowing arrangement (see our Superannuation borrowing arrangements price list for more information)		
documents only		\$1,320
documents and advice		\$3,300
Add member (per member)		\$220
Pension documents (per pension)		
Cooper Grace Ward Deed		\$550
non-Cooper Grace Ward Deed		\$1,100
Binding Nomination (per member)		
no advice		\$275
with advice		request quote

Trusts

Change of trustee (no stamping)		\$495
Deed update (discretionary trust)		\$990
Deed update (unit trust)		\$1,210
Unit trust conversion to a fixed trust (sub-div 272A – loss trust provisions inc general update)		\$1,650
Unit trust conversion to a NSW fixed trust (for land tax purposes inc general update)		\$1,650
Child maintenance trusts (Div 6AA Tax Act) (fee for service)		from \$1,650
Negative gearing trusts (fee for service)		from \$3,300
Generational transfer trusts (fee for service)		from \$3,300
Partitioned discretionary trusts (fee for service)		from \$2,750
Blind partitioned discretionary trusts with company limited by guarantee as trustee (fee for service)		from \$2,750

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.



Facility agreements

To comply with Division 7A (7 year) or debt / equity rules for companies or trusts licence agreements to use suite of documents also available on request	\$330
To comply with Division 7A (25 year including mortgage)	from \$2,200

Corporate

Update constitution of existing company (including to single director status)	\$330
Add director, secretary or shareholder (each)	\$220
Voluntary deregistration	\$275
plus ASIC fees	\$42 \$317
Change of name	\$275
plus ASIC fees	\$422 \$697

Business name

Business name registration	\$275
plus ASIC fees (1 year)	\$37 \$312
plus ASIC fees (3 years)	\$88 \$363

Powers of attorney

Enduring Power of Attorney (no advice)	\$440
General Power of Attorney (no advice)	from \$330

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