

# Adviser services



Price list from 1 July 2023

## Superannuation funds

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

## Trusts

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

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	<b>\$330</b>
To comply with Division 7A (25 year including mortgage)	<b>from \$2,200</b>

## Corporate

Update constitution of existing company (including to single director status)	<b>\$330</b>
Add director, secretary or shareholder (each)	<b>\$220</b>
Voluntary deregistration	<b>\$275</b>
plus ASIC fees	<b>\$47</b> <b>\$322</b>
Change of name	<b>\$275</b>
plus ASIC fees	<b>\$474</b> <b>\$749</b>

## Business name

Business name registration	<b>\$275</b>
plus ASIC fees (1 year)	<b>\$42</b> <b>\$317</b>
plus ASIC fees (3 years)	<b>\$98</b> <b>\$373</b>

## Powers of attorney

Enduring Power of Attorney (no advice)	<b>\$440</b>
General Power of Attorney (no advice)	<b>from \$330</b>

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