

Adviser services



Price list from 1 July 2024

Superannuation funds

Deed update (wholesale replacement)		\$495
Change of trustee (no stamping)		\$495
plus stamping	\$110	\$605
Deed update (wholesale replacement) plus change of trustee in one document (no stamping)		\$715
plus stamping	\$110	\$825
Superannuation borrowing arrangement (see our Superannuation borrowing arrangements price list for more information)		
documents only		\$1,320
documents and advice		\$3,850
Add member (per member)		\$385
Pension documents (per pension)		
Cooper Grace Ward deed		\$825
non-Cooper Grace Ward deed		\$1,320
TRIS agreement (per pension)		
Cooper Grace Ward deed		\$825
non-Cooper Grace Ward deed		\$1,320
Commutation agreement whole or part of pension balance (per pension)		
Cooper Grace Ward deed		\$825
non-Cooper Grace Ward deed		\$1,320
Minimum pension payment agreement (excess to be lump sum payment)		\$825
Binding Death Benefit Nomination (per member)		
no advice		\$550
with advice		request quote

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.

Trusts

Change of trustee (no stamping)	\$495
Deed update (discretionary trust)	\$1,320
Deed update (unit trust)	\$1,320
Exclusion of foreign persons for duty and land tax surcharge purposes	\$440
Unit trust conversion to a fixed trust (sub-div 272A – loss trust provisions inc. general update)	\$1,650
Unit trust conversion to an NSW fixed trust (for land tax purposes inc. general update)	\$1,650
Child maintenance trusts (Div 6AA Tax Act) (fee for service)	<i>from</i> \$1,650
Negative gearing trusts (fee for service)	<i>from</i> \$3,850
Generational transfer trusts (fee for service)	<i>from</i> \$3,850
Partitioned discretionary trusts (fee for service)	<i>from</i> \$3,850
Blind partitioned discretionary trusts with company limited by guarantee as trustee (fee for service)	<i>from</i> \$4,440

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	\$440
To comply with Division 7A (25 year including mortgage)	<i>from</i> \$2,750
To comply with Division 7A (25 year including mortgage and guarantee)	<i>from</i> \$3,330

Corporate

Update constitution of existing company (including to single director status)	\$330
Add director, secretary or shareholder (each)	\$275
Voluntary deregistration	\$385
plus ASIC fees	\$49 \$434
Change of name	\$385
plus ASIC fees	\$491 \$876

Business name

Business name registration	\$385
plus ASIC fees (1 year)	\$44 \$429
plus ASIC fees (3 years)	\$102 \$487

Powers of attorney

Enduring Power of Attorney (no advice)	\$660
General Power of Attorney (no advice)	<i>from</i> \$550

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