

SELF MANAGED SUPERANNUATION DEED PACKAGING FEES FOR CLIENT ADVISERS

MJHC LEGAL LAWYERS

Superannuation · Property · Wills · Commercial

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INSTRUCTION SHEETS

The office of MJHC Legal utilises Instruction Sheets which are PDF Fillable Forms that when completed on your computer can be forwarded by email. Alternatively, the Instructions Sheets can be forwarded by post.

Instruction Sheets for completion by you can be downloaded from the [Documents Download page](#) on the firm's website. Alternatively, contact this office on (03) 9763 0139 or email ca@mjhclegal.com

The fees below are current as at 1 July 2023 and are based on MJHC Legal being provided with completed Instruction Sheets and only apply to instructions received from client advisers.⁽¹⁾ SMSF Trustees should contact the office by phone or email for a fee estimate

STANDARD FEES

Dealing with Client Adviser

New Fund	(email delivery) ⁽²⁾	\$330.00
Deed update	(email delivery) ⁽²⁾	\$242.00 ⁽³⁾
Deed of Variation (QROPS etc)	(email delivery) ⁽²⁾	\$330.00
Trustee Appointment package	(email delivery) ⁽²⁾	\$242.00
New Member package	(email delivery) ⁽²⁾	\$176.00 ⁽⁴⁾
Cessation of Membership package (NIL balance member)		\$220.00 ⁽⁴⁾
Cessation of Membership package (SuperStream Rollover)		\$220.00 ⁽⁴⁾
BDBN Package (for 1 member)	(email delivery) ⁽²⁾	\$242.00
BDBN Package (for 2 member)	(email delivery) ⁽²⁾	\$275.00 ⁽⁵⁾
Confirmatory Deed package	(email delivery) ⁽²⁾	\$275.00 ^{(6)*}
Customised Deed package (Saunders v Vautier)	(email delivery) ⁽²⁾	\$440.00 ^{(7)*}
Providing replacement or duplicate package prepared by MJHC Legal but not subsequently signed by the parties		
	(email delivery) ⁽²⁾	\$77.00
Providing replacement package due to incorrect Instructions received from client adviser ⁽⁸⁾		
	(email delivery) ⁽²⁾	\$33.00

**Note that fee for Confirmatory Deed & Customised Deed packages are estimates only*

General Advice

- including review of existing SMSF deed documents \$550.00 per hour

VOLUME FEES

Contact MJHC Legal for a fee estimate if you have multiple instructions for deed establishments or deed amendments. Minimum 5 Funds required at any one time.

Note:

Any discounts only apply if MJHC Legal receives completed instruction sheets for each deed/Fund.

OTHER FEES

LRB Security Trust Deed Package

- PDF email delivery \$440.00

Company Establishment

- | | | |
|------------------------------|---------------------------------|------------|
| • new company without a seal | (email delivery) ⁽²⁾ | \$1,200.00 |
| • new company with a seal | (email delivery) ⁽²⁾ | \$1,267.00 |

NOTES

- (1) Client Advisers are accountants, financial planners and fund administrators.
- (2) Optional printing, binding and delivery additional fee of \$110.00 incl GST
- (3) An additional postage and handling fee of \$33.00 will apply if third party paper documents are required to be returned.
- (4) Add \$22.00 for each member after the first new Member admitted.
- (5) Applies to non-lapsing mirror BDBN for spouses/domestic partners covering income stream and all other death benefits to surviving spouse/partner but if not survived by spouse/partner to LPR.
- (6) The fee applies for each Confirmatory Deed package prepared. The nature of the defects or irregularities in prior documentation will determine if one or more confirmatory deed package is required. The final fee will be determined by the time expended on review and examination of the historical documents and customised drafting required for the confirmatory deed package.
- (7) Defects or irregularities in prior documentation may be of a nature that cannot be solved by the preparation of a Confirmatory Deed. MJHC Legal usually resolves these issues by preparing a customised deed of variation package relying on the trust law rule of *Saunders v Vautier*. The alternative is to go to the time and expense of seeking the assistance of the Court to amend the deed. Our solution is more practical and cost effective.
- (8) Applies only to packages corrected at request of client adviser within 14 days after delivery of original package after which full fee will apply.

Liability limited by a scheme approved under Professional Standards Legislation