

## 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 fax or post.

To obtain Instruction Sheets for completion by you please contact this office on (03) 9543 5544 or email [ca@mjhclegal.com](mailto:ca@mjhclegal.com)

The fees below are current as at 15 August 2018 and are based on MJHC Legal being provided with completed Instruction Sheets and only apply to instructions received from client advisers.<sup>(1)</sup>

The fee applicable for instructions received from Fund Trustees will generally be the "hard copy" fee.

### STANDARD FEES

#### Deed of Establishment Package

- PDF email delivery \$220.00
- Hard copy - no folder <sup>(2)</sup> \$270.00

#### Deed of Amendment Package

- PDF email delivery <sup>(3)</sup> \$220.00
- Hard copy \$270.00

#### Deed of Appointment Package <sup>(4)</sup>

- PDF email delivery <sup>(3)</sup> \$220.00
- Hard copy \$250.00

#### Confirmatory Deeds of Establishment/Amendment/Appointment <sup>(5)</sup>

- PDF email delivery <sup>(3)</sup> \$250.00 - \$350.00
- Hard copy \$280.00 - \$400.00

#### Admission of new Member Package <sup>(6)</sup>

- PDF email delivery <sup>(3)</sup> \$175.00
- Hard copy \$200.00

#### BDBN Package for one person <sup>(7)</sup>

- PDF email delivery \$220.00
- Hard copy \$275.00

#### BDBN Package for two people (mutual) <sup>(7)</sup>

- PDF email delivery \$275.00
- Hard copy \$330.00

#### Replacement/Duplicate Deed Packages

Providing replacement or duplicate package prepared by MJHC Legal but not subsequently signed by the parties

- PDF email delivery <sup>(3)</sup> \$77.00
- Hard copy \$99.00

Providing replacement package due to incorrect Instructions received from client adviser <sup>(8)</sup>

- PDF email delivery <sup>(3)</sup> \$27.50
- Hard copy \$55.00

#### General Advice

- including review of existing SMSF deed documents \$440.00 per hour

The whole or part of this fee will be rebated if MJHC Legal instructed to prepare deed packages associated with the advice provided.

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## VOLUME FEES

The following fees apply where instructions for 5 or more deed packages are received.

**Please note:** These discounts only apply if MJHC Legal receives completed instruction sheets for each deed:

### Deed of Establishment Package

- PDF email delivery \$192.50
- Hard copy - no folder <sup>(2)</sup> \$220.00

### Deed of Amendment Package - Upgrade of MJHC Legal Deed

- PDF email delivery <sup>(9)</sup> \$172.50
- Hard copy \$192.50

### Deed of Amendment Package - Upgrade of Other Providers Deeds

- PDF email delivery <sup>(9)</sup> \$200.00
- Hard copy \$220.00

Standard fees apply to any required confirmatory deed packages,

## LRB FEES

### LRB Security Trust Deed Package

- PDF email delivery \$440.00

### Company Establishment <sup>(10)</sup>

- new company without a seal \$990.00
- new company with a seal \$1,010.00

## NOTES

- (1) Client Advisers are accountants, financial planners and fund administrators.
- (2) Add \$88.00 for folder and tab dividers.
- (3) An additional postage and handling fee of \$20.00 will apply if third party documents are required to be returned.
- (4) Includes Admission of new Member package.
- (5) 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.
- (6) Add \$22.00 for each member after the first new Member admitted.
- (7) Applies to non-lapsing mutual 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.
- (8) Applies only to packages corrected at request of client adviser within 14 days after delivery of original package.
- (9) An additional postage and handling fee of \$10.00 will apply if third party documents are required to be returned.
- (10) An additional postage and handling fee of \$13.75 will apply.

Liability limited by a scheme approved under Professional Standards Legislation