

Fund Establishment Service

This is a fee based service which provides you with a fully established superannuation fund including establishment minutes and other documentation. This service includes:

Deed Provision

- Organising the trust deed

Fund Establishment

- Preparing establishment Minutes, application forms, trustee acceptances etc
- Providing binder for trustees
- Providing appropriate establishing documents – ATO & trustee
- Establishing Corporate Trustee (if required) – complete ASIC work as required
- Establishing Macquarie Cash Management Trust account (if required)

Completing Rollover of funds as instructed

- Complete rollovers from other funds to fund's bank account
- Advising when complete and handing over to you

Smartsuper can either invoice the client directly or can invoice you to on bill.

Fees for this service

Complying Deed	\$660
Establishment of Fund	\$660
Total Establishment fee	<u>\$1,320</u>

Completing Rollovers \$165.00 per hour

Set up Corporate Trustee Company \$1,150

Please note - all fees are inclusive of GST

For more information:

 Phone smartsuper Client Services on **1300 138 348**