

Superannuation benefits solutions

	GUARANTEED FIXED PRICE	SOLUTION PROVIDED	PROCESS AND ACCESS TO SPECIALISTS	VIEW LEGAL ASSUMPTION OF LIABILITY FOR ALL PACKAGES
<i>Concierge</i>	Single \$1,320 Couple \$1,980	Superannuation Will	<ul style="list-style-type: none"> • Up to 30 minute technology enabled meeting between adviser and specialist View Legal lawyer • Meeting designed to explore all relevant alternatives collaboratively with adviser • Once structuring approach has been agreed, adviser submits completed instruction form • Legal documentation is prepared based on agreed instructions 	<p>Covers:</p> <p>a. documentation produced</p> <p>b. legal sign-off that the nomination is appropriate in the context of the member's estate plan,</p> <p>provided that a 'Fact Find' is submitted confirming client's existing estate planning arrangements</p>
<i>Comprehensive</i>	Single \$990 Couple \$1,320	BDBN or NBDBN	<ul style="list-style-type: none"> • Up to 15 minute technology enabled meeting between adviser and specialist View Legal lawyer • Meeting designed to explore all relevant alternatives collaboratively with adviser • Once structuring approach has been agreed, adviser submits completed instruction form • Legal documentation is prepared based on agreed instructions 	
<i>Compliance</i>	Single \$330 Couple \$550	BDBN or NBDBN	<ul style="list-style-type: none"> • No discussion or advice provided to adviser • Legal documentation is prepared based on instructions and review of fact 	

BDBN means non-lapsing binding death benefit nomination • **NBDBN** means non-lapsing non-binding death benefit nomination • **Superannuation Will** means a deed of variation to the SMSF deed which hardwires the BDBN into the deed •

THINGS TO NOTE: • A tax invoice for the agreed price will be provided at the time of providing the draft documents. • Each price is guaranteed in relation to the service provided. If at any time you believe the value we provide does not reflect the agreed price please contact us immediately so we can agree an adjustment • Solution available only for self-managed superannuation funds (**SMSF**) • All submissions must include a copy of the most recently executed SMSF trust terms and a 'Fact Find' confirming client's existing estate planning arrangements • Prices may change if the SMSF deed does not permit a member to make a BDBN • All prices are GST inclusive • Instructions must be submitted via our website, or if no web form is currently available, then via an emailed instruction form • Unless printing option is selected, all documentation is provided electronically • For printing, binding and delivery, additional fees apply • This document is current as at 2 March 2020 • We are constantly evolving our offerings based on customer feedback so please contact us if you have any questions