



Schedule of Fees

Minimum Charges Including GST from 30 June 2020

SMSF Tax Return, Annual Statements and Yearly Administration Fee

Funds over \$300,000 invested	Annual - \$3,300 Monthly - \$275
Funds under \$300,000 invested	1.1% OR our hourly rate for time.

*Note: Financial planning fees are additional. See financial planning pricing structure

Other Charges

SMSF Setup with Company Trustee	\$2,200
Bare Trust Setup with Corporate Trustee	\$2,200
Winding up of SMSF	\$1,100 plus hourly rate
SMSF Corporate Trustee Deregistration	\$330
Superannuation Deed Amendment	\$550
Superannuation Deed Update	\$550
Superannuation Trustee Company	\$1,100
ASIC Changes (price per change if registered agent not WFS)	\$330
ASIC Agent Register	\$330
Telephone calls, emails, drop-in enquiries, extra appointments, ATO issues, all other enquiries	Hourly Rate

Hourly Rates

Principal Accountant	\$440 per hour
Senior Accountant/SMSF and Superannuation Specialist	\$220 per hour
General Accountant/General SMSF and Superannuation Work	\$180 per hour

Terms:

- Individuals must pay prior to lodgement of return.
- 14 Day accounts only. Where your account exceeds 30 days it will be referred to debt collection and all debt collection costs will be added to your account.
- Quarterly billing and payment in advance apply to clients whose billing exceeds \$2,750 per annum.
- 1% surcharge on credit cards.
- Interest payable at 10% per annum on overdue accounts plus an admin fee of \$10 per month
- These are minimum charges and should be used as a guide only. Where the complexity of the work or extra effort is required due to the state of the records an extra fee will be based on actual time required and billed on a time basis at the hourly rates quoted above.
- Additional charges apply for pension setup, financial planning, transition to retirement pensions, tax planning, re-contribution strategy, binding death nominations, estate planning etc when the time involved exceed allocated time. Refer to the Financial Planning Fee Schedule.
- Financial Planning charges are additional if required within SMSF's.