



# Schedule of Fees

Minimum Charges Inc. GST from 1 July 2014

## SMSF Tax Return, Annual Statements and Yearly Administration Fee

Funds over \$250,000 invested	Outright - \$2,880 Monthly - \$240
Funds under \$250,000 invested	1.1% OR our hourly rate for time
Partnership Return	\$770

\*Note: Financial planning fees are additional. See financial planning schedule.

## Other Charges

SMSF Setup with Company Trustee	\$2,200
Bare Trust Setup with Corporate Trustee	\$2,200
Winding up of SMSF	\$880
SMSF Corporate Trustee Deregistration	\$110
Superannuation Deed Amendment/Update	\$440
Binding Death Benefit Nomination	\$330
ASIC Changes (price per change)	\$165
Residential Mortgage Broking and Leasing	Free of charge
Insurance	Free of charge
- Property Portfolio Plan	\$385
Tax, Business, Commercial Lending, GST Advice (Principal)	\$440 p/hour
Telephone calls, emails, drop-in enquiries, extra appointments, tax planning advice, ATO issues, all other enquiries	Hourly Rate

## Hourly Rates

Principal Accountant	\$440 p/hour
Senior Accountant/MYOB Specialist/SMSF and Superannuation Specialist	\$220 p/hour
General Accountant/General SMSF and Superannuation Work	\$180 p/hour
General MYOB Support/Processing/Administrative Work	\$90 p/hour

### Terms:

- \* Individuals must pay prior to lodgement of return or by fee from refund.
- \* 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 applies to clients whose billing exceeds \$2,750 p/a
- \* 1% surcharge on credit cards.
- \* Interest payable at 10% p/a on overdue accounts plus an admin fee of \$10 per month
- \* These are minimum charges only 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 exceeds allocated time. Financial Planning Fee Schedule
- \*\*\* Financial Planning charges are additional if required within SMSF's