



Quality SMSF Products

	Price	Qty
Monthly Newsletters — these complementary newsletters are full of useful tips and traps as well as detailing changes in the law, upcoming seminars, new products, etc.	Free	___
FY 2011 SMSF Kit — this kit provides an action list (with detailed commentary for each item) running you through all relevant SMSF issues to consider in the lead up to 30 June 2011. The action list includes contributions, pensions, overseas issues, death benefit nominations, issues related to the SMSF's investments, annual administration requirements and more.	\$150	___
		
SMSF Borrowing Memo — Updated for the new borrowing rules introduced from 6 July 2010. This publication provides guidance on the new 'instalment warrant'-type borrowing arrangements covering the latest from the ATO, opportunities, strategies, tips, traps, rules relating to SMSFs borrowing, tax implications (income tax/CGT, stamp duty and GST), frequently asked questions and much more.	\$220	___
		
Investment Strategy Kit — written super fund investment strategies are a legal requirement and also benefit and protect trustees. They also can prevent advisers from being sued. This kit is a very comprehensive and practical explanation of how to draft an investment strategy. It also includes three detailed sample strategies in MS Word format: 1: balanced, diversified strategy; 2: real estate only strategy (member in pension mode); and 3: gearing strategy to acquire real estate.	\$440	___
Investment Reserving Kit — provides valuable guidance on establishing and managing investment reserves, including the taxation implications of allocating reserves in respect of contributions caps. Also included are templates of resolutions to establish reserves (including a reserving strategy), review reserving strategy and allocating reserves.	\$440	___
Pension Kit: Commencement — contains all the template documentation and instructions necessary to commence a pension. Included in each kit is a PDS, detailed trustee resolutions, member application, member summary, instructions regarding appropriate ATO forms, commentary on segregation and more.		
Commence an account-based pension:	\$440*	___
Commence a transition to retirement income stream:	\$440*	___
Commence a market linked pension (term allocated pension):	\$440*	___
Pension Kit: Conversion — contains all the template documentation and instructions necessary to convert from one type of pension to another, including a PDS, trustee resolutions, member application and member summary.		
Convert an allocated pension to an account-based pension:	\$440*	___
Convert a transition to retirement allocated pension to a TRIS:	\$440*	___
Pension Kit: Roll-Back (Commutation/Termination) — this is vital for those who wish to effectively add to the capital supporting a pension or merely end a pension. Contains all the template documentation and instructions necessary to terminate a pension and roll the resulting lump sum back into the fund. Includes letter to the trustee, detailed trustee resolutions and letter to the member.	\$330*	___

SMSF to SMSF Roll-Over Kit — contains documentation and instructions necessary to roll-over a lump sum from one SMSF to another. Includes letters from member to trustees, detailed trustee resolutions, letters from trustees to member and guidance on appropriate ATO forms.	\$330* _____
Lump Sum Kit — a comprehensive kit to facilitate the payment of a lump sum. This includes a checklist and instructions, a letter of request to pay a lump sum, resolutions and PAYG summary.	\$330 _____
Trustee Compliance Kit — helps trustees ensure that their SMSFs comply with relevant laws with a strong emphasis on proper minute keeping. Includes a detailed memo discussing how and when to make minutes as well templates of 20 of the most popular trustee minutes.	\$150 _____
SMSF & Estate Planning Report — Contains comprehensive and valuable guidance including estate and succession planning tips regarding SMSFs. Topics covered include how death benefits may be paid out, taxation treatment, lump sum versus pension options, deciding who to pay, binding death benefit nominations, checklist for SMSFs upon death and much more.	\$99 _____
Anti-Detriment Memo — a detailed memo on how to utilise a section 295-485 (anti-detriment) deduction for advisers and trustees especially those with an interest in SMSF estate planning. It contains comprehensive information to enable you to become an expert on anti-detriment deductions, including detailed commentary on the law, practical guidance, detailed examples and explanations, the latest from the regulators, template minutes to implement and invaluable planning tips and traps.	\$550 _____
SMSF & Unit Trust Kit — provides valuable guidance and practical tools for SMSFs that invest in unit trusts. It covers SMSFs investing in non-geared unit trusts, converting a pre-99 geared unit trust into a non-geared unit trust and the rules on pre-99 geared unit trusts. It includes sample SMSF and unit trust resolutions, various unit trust forms, a detailed memo with practical planning tips and traps and more.	\$440 _____
Crystallisation Kit — provides practical guidance, worked examples and template documentation to assist SMSF trustees and their advisers in calculating and recording the crystallised pre-July 83 component making-up a member's superannuation interest. This kit is especially valuable for those with interests that crystallise after 2007.	\$220 _____

Name _____ Firm _____

Street Address _____

Mailing Address _____

Phone _____ Email _____

* Prices quoted are for single-use licences only (ie, can only be used to commence/convert/roll-back etc **one** pension). Multi-use licence details are available on request.

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