

SMSF toolkits	e-doc on demand digital payg legal review at no extra cost complimentary general advice	legal services full legal service advice tailored documentation
Appointing new trustee or director Appointing a trustee-director FAQ Appointment of trustee or director Resignation of trustee or director	Complimentary \$88 \$88	
Death benefit nominations BDBN SMSF Death benefit nominations FAQ for SUPERCentral SMSF deeds Binding death benefit nomination SMSF to single beneficiary Binding death benefit nomination – multiple beneficiaries (standard form) Binding death benefit nomination – cascading – individual Binding death benefit nomination – class cascading Death benefit allocation – FAQ's for SUPERCentral and Townsends Lawyers SMSF Deeds Death benefit allocation – binding nomination Death benefit allocation – no nomination Death benefit allocation – non-binding nomination Death benefit nomination revocation ATO NAT 74924 rollover death benefit statement	Complimentary \$55 \$55 \$55 \$55 Complimentary \$55 \$55 \$55 \$55 Complimentary	
Change of fund name Change of fund name - FAQ Change of fund name resolution	Complimentary \$88	
Change of trustee/directors Appointing a trustee or director – FAQ Appointment of trustee or director Trustee Declaration ATO NAT 71089 Change of details for super entities ATO NAT 3036	Complimentary \$88 Complimentary Complimentary	
Compliance Trustee Representation Letter	\$88	
Contributions Contributions information sheet Contribution – refund breach of SIS Reg 7.04(1),(1A) or (2)	Complimentary \$88	
Contribution acceptance Contribution acceptance resolution (catch up concessional contributions) Contribution acceptance resolution (concessional contributions) Contribution acceptance resolution (non-concessional contributions) Contribution acceptance resolution (spouse contributions) Contribution acceptance resolution – CGT Contribution acceptance resolution (Structured settlement / Personal Injury) ATO QC 19583 – contributions for personal injury - instructions	\$88 \$88 \$88 \$88 \$88 \$88 \$88 Complimentary	

Contribution excess Excess concessional contributions FAQ Excess concessional contributions – release resolution	Complimentary \$88	
Contribution splitting Contribution splitting FAQ Contribution splitting template kit – current year – external split Contribution splitting template kit – current year – internal split Contribution splitting template kit – previous year – external split Contribution splitting template kit – previous year – internal split	Complimentary \$88 \$88 \$88 \$88	
Contributions unallocated Unallocated contributions information sheet Unallocated contributions account – Allocation to UCA – Contributions received June 2025 Unallocated contributions account transfer from UCA-crediting to member July 2025 Unallocated contributions account – termination	Complimentary \$88 \$88 \$88	
Derivative risk statement Derivative Risk Statement – FAQ Derivative Risk Statement and adoption resolution	Complimentary \$88	
Division 293 Division 293 FAQ Division 293 release authority	Complimentary \$88	
Investment Strategy Investment strategy information sheet SMSF Investment decision tree SMSF Investment and Insurance Strategy	Complimentary Complimentary \$88	
Lump sum / Benefit payment Lump sum benefit payments FAQ Lump sum – full cashing out Lump sum – full roll over Lump sum – partial cashing out ATO NAT 70764 super lump sum pre-payment statement ATO NAT 70946 PAYG payment summary – super lump sum – instructions ATO NAT 70944 rollover benefits statement ATO NAT 70947 PAYG payment summary superannuation lump sum ATO NAT 75359 request to rollover whole balance ASIC form 370 (officeholder notification of resignation)	Complimentary \$88 \$88 \$88 Complimentary Complimentary Complimentary Complimentary Complimentary	

Member joining Admission of a child member resolution Admission of an adult member resolution Tax File Number Notification (Adult Member) Tax File Number Notification (Child Member) ATO NAT 3036 – change of details for super entities Member leaving Exit of a member from SMSF – transfer of entire benefit Exit of a member – FAQ’s whole of balance transfers (non-death benefit rollovers) Written resolution – exit of adult member by death ATO NAT 70944 rollover benefits statement ATO NAT 75359 Request to rollover whole balance of super benefits ATO NAT 3036 – change of details for super entities ATO QC 28175 How to complete rollover benefit statements Pensions changing current pension Excess payments commutation strategy FAQ Excess minimum pension payment strategy Excess minimum pension payment strategy – revocation ATO NAT 74923 Transfer Balance Account Report) ATO NAT 70764 (Pre-Payment Statement) Pensions cash out Pension cashing out FAQ Pension – full cash out Pension – partial cash out Pensions roll back Pension – roll back FAQ Pension – full roll back Pension – partial roll back Pensions rollover Pension – rollover FAQ Pension – full rollover Pension – partial rollover Reversionary beneficiary transfer (Transferred Pension) Transition to Retirement TRIS pension – attainment of retirement phase	\$88 \$88 \$88 \$88 Complimentary \$88 Complimentary \$88 Complimentary Complimentary Complimentary Complimentary Complimentary \$88 \$88 Complimentary Complimentary Complimentary \$88 \$88 Complimentary \$88 \$88 Complimentary \$88 \$88 \$88 \$88	
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Pension variation reversionary		
Pension – changing reversionary beneficiary	\$88	
Pension – making pension non-reversionary (removal)	\$88	
Pension – making pension spouse reversionary	\$88	
Pension variation – adoption of account-based pension payment rules	\$88	
Pension variation – non-reversionary to reversionary (general)	\$88	
 Reserve resolution		
Reserve resolution – investment reserve	\$88	
Reserve resolution – operational risk reserve	\$88	
 SMSF service providers appointment		
Auditor appointment resolution – approved SMSF auditor	\$88	
Investment Adviser – Replacement resolution	\$88	
Investment adviser appointment resolution	\$88	
Resolution – opening an account at a financial institution	\$88	
Tax agent replacement resolution	\$88	
ATO NAT 3036 – change of details for super entities	Complimentary	
ATO contact person removal & replacement	\$55	
ATO contact person initial appointment	\$55	
ATO contact person additional appointment	\$55	
 SMSF deed closing down		
Winding up SMSF resolution – deceased sole member	\$88	
Winding up SMSF resolution – with surviving members	\$88	