

H&R Block SMSF Solutions pricing guide



Start Up Cost	Annual Fees	Other services
<p>Initial advice</p> <p>Statement of Advice – SMSF Establishment \$550</p> <p>Establishment costs</p> <p>Fund Establishment with individual Trustees \$750</p> <p>Fund Establishment^ with a corporate Trustee \$1,590</p> <p><i>^Includes ASIC company registration fee of \$488</i></p> <p>SMSF Borrowing</p> <p>Bare Trust Package</p> <p>Related Party \$1,650</p> <p>Bank Lender \$1,300</p> <p><i>Includes bare trust deed, resolutions, legal review, advice & sign off, Guaranteed to be accepted by any lender</i></p> <p>Corporate Trustee Establishment \$840</p> <p><i>Includes ASIC company registration fee of \$488</i></p>	<p>Financial Statements & Tax Return* \$1,800</p> <p><i>Paid via monthly direct debit</i></p> <p><i>No restrictions on number & type of investments.</i></p> <p>Independent audit \$400</p> <p>ASIC Corporate Secretarial Service \$110</p> <p>Actuarial Certificate – Account Based Pension \$200</p> <p>Actuarial Certificate – Defined Benefit Pension \$500</p> <p>Compliance Breaches</p> <p>Audit Contravention Report \$165</p> <p><i>*If more than two financial years are outstanding additional fees may be applicable.</i></p>	<p>Pension Establishment, Restart & Commutation (per event per member) – including Statement of Advice \$500</p> <p>Lump Sum Withdrawal (per withdrawal) \$110</p> <p>Trust Deed Upgrade – Initial \$400 – Subsequent \$299</p> <p>Deed Replacement – includes legal review & sign off \$600</p> <p>Change of Trustee \$495</p> <p>Establish Corporate Trustee^ (to replace individual trustees) \$840</p> <p><i>Includes ASIC company registration fee of \$488</i></p> <p>Specialist one off advice/ Assistance with ATO Audits by quote</p>

Any questions or to obtain an application form – Email: smsf@hrblock.com.au Phone: 1300 611 320