

H&R Block SMSF Solutions Pricing Guide

Establishment Costs

SMSF establishment with individual trustees	\$750
SMSF establishment with corporate trustee	\$1,590*

**Includes ASIC company registration fee of \$506*

SMSF Borrowing

Bank Lender Bare Trust Package	\$2,840
Related Party Bare Trust Package	\$3,340

Includes corporate trustee and ASIC company registration fee of \$506

Other Services

ASIC Agent for Corporate Trustee – per annum	\$110
Pension Establishment – per member	\$500
Pension Establishment – for 2 members	\$900
Lump Sum Withdrawal – per withdrawal	\$110
Trust Deed Upgrade – Initial	\$450
– Subsequent	\$330
Deed Replacement	\$660
Change of Trustee	\$550
Corporate Trustee Establishment to replace individual trustees	\$840*

**includes ASIC company registration fee of \$506*

Specialist one-off advice – hourly rate (min. one hour)	\$330
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Annual Fees

Financial Statements and Tax Return	\$1,900
Independent Audit	\$450
Total	\$2,350

– receive \$100 discount on fees if paid via monthly direct debit in the year for which the financial statements are to be prepared.

– If not paid via monthly direct debit, 50% of total fee to be paid to commence the work, the balance owing on lodgement of the tax return.

– NO restriction on the number and type of investments. You are free to use any financial institution and broking platforms.

Additional Annual Fees

Where the following elements are applicable to the fund, there is an additional annual fee:

GST Registered Fund	\$250
Segregated Fund	\$550
Cryptocurrency	By quote
Overseas Property	\$550
Actuarial Certificate – Account Based Pension	\$220
– Defined Benefit Pension	\$600
Audit Contravention Report	\$250