

# What is included in the Topdocs SMSF Establishment & Deed Update packages?



## What is included in the SMSF Establishment?

It **couldn't be easier** to establish and maintain a Self Managed Super Fund.

### The Topdocs SMSF establishment package includes:

- 1 Bound copy of the Topdocs SMSF Trust Deed;
- 1 unbound copy of the Deed to scan;
- A high quality leather look binder indexed with tabs to store your documents in;
- A CD containing a copy of all prepared documents;
- Trustee minutes to establish the Fund;
- Member applications and Trustee consents;
- Product Disclosure Statement for each Member of the Fund;
- Binding Death Benefit Nomination sample form and explanatory notes for each Member;
- Notes on opening a bank account in the name of the Fund;
- Forms to register the Fund with the ATO, and to stamp the Trust Deed with the Revenue Office in applicable states;
- Notes explaining the procedures to establish and maintain the Fund.

## What is included in the SMSF Deed Update?

### The Topdocs SMSF Trust Deed Variation package includes;

- Full Legal Oversight of the Deed Variation;
- 1 bound copy of the Topdocs SMSF Trust Deed;
- 1 unbound copy of the deed to scan;
- Trustee minute varying the Trust Deed;
- Minute of consent by the appropriate party to vary the Trust Deed (where applicable);
- Product Disclosure Statement for each Member of the Fund;
- Binding Death Benefit Nomination sample form and explanatory notes for each Member;
- Detailed information on how to have the Trust Deed Variation documents stamped by the local Revenue Office, including a covering letter (in applicable states);
- Letters to Members notifying them of the Variation.

For more information contact a Topdocs Consultant on 1300 659 242.