

# Welcome to the Topdocs Document Portal



## The Fastest and Smartest way to order your documents!

Thank you for registering to use the Topdocs Document Portal, the fastest and smartest way to order your Super Fund, Company and Trust documents.

Attached you will find instructions on how to place an order via the Document Portal. If you have any queries, a Topdocs Consultant would be happy to assist you, so please don't hesitate to contact our office on 1300 659 242 or send us an email at [support@topdocs.com.au](mailto:support@topdocs.com.au).

You can login to the Document Portal at any time by going to [www.topdocs.com.au](http://www.topdocs.com.au) and entering your username and password in the login box located at the top of the page.

## Features of the Document Portal

The Topdocs Document Portal is designed to make ordering documents quick and easy. Some of the features of our Portal include:

- **Instant Download Documents**

Place your order, then download your fully tailored documents in PDF format instantly. From start to finish, you will receive fully tailored documents on your desktop in less than five minutes! (note some documents are not available as instant download).

- **Save Time and reduce errors**

Our Smart Order forms eliminate errors by allowing you to type information once, then use that information in multiple places. Click a 'same as' button and make Member 2's address the same as Member 1's, without having to retype the address.

Topdocs smart forms also save you time. Order a Topdocs Pension and all relevant calculations are done for you, including the minimum and maximum payment amounts. Within 5 minutes you can have a fully tailored, SIS and ASIC compliant pension on your desktop!

- **Save Money**

Order your documents as 'Instant Download PDF', and not only do you receive your documents instantly, but you also receive significant discounts.

**1. Login to the Document Portal**

Go to [www.topdocs.com.au](http://www.topdocs.com.au) and enter your username and password into the login box at the top of the page.

Remember, your username and password are case sensitive.

Document Name	Description	Instant Download Price	Full Service Price
<b>:: SMSF Establishment and Deed Documentation</b>			
SMSF Establishment	Establish a new Self Managed Superannuation Fund	\$234.00	\$374.00
SMSF Establishment (ABN)	Establish a new SMSF (including ABN & TFN Registration)	\$333.00	\$473.00
SMSF Deed Update	Update the Trust Deed of an existing SMSF	N/A	\$374.00
SMSF Investment Strategy	Update your SMSF's Investment Strategy	\$84.00	\$122.00
SMSF Lost Trust Deed	Adopt a new Trust Deed (use when no existing deeds can be located)	N/A	\$468.00
SMSF Trustee Change	Change the Trustee of a SMSF	N/A	\$309.00
Super Fund Borrowing - Bank Lender	SMSF Custodian Trust Package - for Bank Loan transactions - email form	N/A	\$1,496.00
Super Fund Borrowing - Related Lender	SMSF Custodian Trust and Loan Package - for Related Party Loan transactions - email form	N/A	\$1,683.00
<b>:: SMSF Pension Documentation</b>			
Account Based Pension	Commence a Standard Account Based Pension	\$165.00	\$374.00
Account Based Pension - TRIS	Commence a Transition to Retirement Income Stream (Account Based Pension)	\$165.00	\$374.00
Account Based Pension Reset & TRIS Reset	Reset an existing Account Based Pension or Transition to Retirement Income Stream	\$165.00	\$374.00
Allocated Pension Conversion	Convert a Standard Allocated Pension to an Account Based Pension	\$165.00	\$374.00
Allocated Pension Conversion (TRIS)	Convert a Transition to Retirement Allocated Pension to a TRIS Account Based Pension	\$165.00	\$374.00
<b>:: Companies and Trusts</b>			
Company Registration - Sole Purpose SMSF Trustee	Establish a Company to act as Trustee of a SMSF	N/A	\$627.00
Company Registration - Standard P/L	Establish a Standard Pty Ltd Company	N/A	\$627.00
Company Registration with Seal - Sole Purpose SMSF Trustee	Establish a Company to act as Trustee of a SMSF with a Company Seal	N/A	\$671.00
Company Registration with Seal - Standard P/L	Establish a Standard Pty Ltd Company with a Company Seal	N/A	\$671.00

**2. Click on the document you wish to purchase**

When you login to the Document Portal, you will see a number of documents available to order, along with the 'instant download' and 'full service' price.

To order a document, click on the document you wish to order.

**Instant Download Documents**

Order your document as 'Instant Download' and your documents will be provided to you as PDF files when you pay for your order.

**Full Service Documents**

Order your document as 'Full Service' and your documents will be printed and bound by Topdocs when you pay for your order and will include lawyer sign off on Deed & Constitution Updates, Trustee Changes, and Bare Trust Documentation.

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Email: support@topdocs.com.au  
www.topdocs.com.au

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**New Orders**

To place an order, click on the document you wish to purchase, enter your reference for that order, and select your desired method of delivery of the documents, either instant download, or full service.

Instant Download Price is price you will pay if you elect to download your documents immediately in soft copy.  
Full Service Price is the price you will pay if you elect to have your documents delivered to you by a courier or by a lawyer signoff, such as a SMSF deed updates, are full service.

Expand All/None Refresh

Document Name	Instant Download Price	Full Service Price
<b>SMSF Establishment</b>		
SMSF Establishment	\$234.00	\$374.00
SMSF Establishment (ABN)	\$333.00	\$473.00
SMSF Deed Update	N/A	\$374.00
SMSF Investment Strategy	\$84.00	\$122.00
SMSF Lost Trust Deed	N/A	\$468.00
SMSF Trustee Change	N/A	\$309.00
Super Fund Borrowing - B	N/A	\$1,496.00
Super Fund Borrowing - R	N/A	\$1,683.00
<b>SMSF Pension Documents</b>		
Account Based Pension	\$165.00	\$374.00
Account Based Pension - T	\$165.00	\$374.00
Account Based Pension Re	\$165.00	\$374.00
Allocated Pension Conversion	\$165.00	\$374.00
Allocated Pension Conversion (TRIS)	\$165.00	\$374.00
<b>Companies and Trusts</b>		
Company Registration - Sole Purpose SMSF Trustee	N/A	\$627.00
Company Registration - Standard P/L	N/A	\$627.00
Company Registration with Seal - Sole Purpose SMSF Trustee	N/A	\$671.00
Company Registration with Seal - Standard P/L	N/A	\$671.00

**New Order Screen**

Enter your reference for this Order:

Type of service for this order:

Full Service - \$374.00

Instant Download Service - \$234.00

### 3. Enter a reference for your order

Your reference will enable you to identify your order in your 'Previous Orders' section of the Document Portal.

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Order No.(4181) Jane Jones Super Fund

**SMSF Establishment**

1  
2  
3  
4

**Member 1 Details**

Member 1 Full Name

Member 1 Date of Birth

Address the same as the Fund's Registered Address?  
 Yes  No

Member 1 Address - Street  
123 Meeting Address  
Suburb  
Melbourne State  
VIC Postcode  
3000

**Member 2 Details**

Member 2 Full Name

Member 2 Date of Birth

Is Member 2 Address

Same as the Fund's Registered Address  
 Same address as Member 1  
 Neither

Member 2 Address - Street

Suburb State Postcode

### 4. Complete your order

Our Smart order forms making ordering your documents easy.

Make sure you make use of our 'same as' address functions.

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Order No.(4181) Jane Jones Super Fund

### SMSF Establishment

**Member 2 Details**

Member 2 Full Name  
James Jones

Member 2 Date of Birth  
1/08/1946

Is Member 2 Address

Same as the Fund's Registered Address  
 Same address as Member 1  
 Neither

Member 2 Address - Street  
123 Meeting Address

Suburb Melbourne State VIC Postcode 3000

**Trustee Details**

Type of Trustee  Individual Trustees  Corporate Trustee

**Individual Trustee 1 - Full Name**  
Jane Jones

Trustee 1 Address - Street  
123 Meeting Address

Suburb Melbourne State VIC Postcode 3000

**Individual Trustee 2 - Full Name**  
James Jones

Trustee 2 Address - Street  
123 Meeting Address

Suburb Melbourne State VIC Postcode 3000

Navigation: [First] [Previous] [Next] [Last] [Finish]

## 5. Submit your answers

Once you have completed all the answers in your order form, click on the finish button.

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Order No.(4181) Jane Jones Super Fund

### Payment and Download Instructions

**Online Delivery**  
If you have chosen 'Online Delivery' of your documents, you will need to pay for your order before downloading your documents by clicking on the 'Purchase and download documents' button. After payment is made, the download links at the bottom of the page will become live.

**Full Service Delivery**  
If you have chosen 'Full Service' Delivery of your documents, please pay for your order by clicking on the 'Purchase and download documents' button. Your instructions will

Navigation: [Review Answers] [Return to your Interview] [Email us about this Order] [Purchase and Download Documents] [Save and Exit]

The table below shows the available assembled documents produced from your interview answers, which are ready for download. (\*\*\*) Be aware that the PDF documents can take 20 to 30 seconds to produce and be ready for download. (\*\*\*)

Download -->	Title
Download -->	Answer Summary
Download -->	SMSF Establishment Trust Deed
Download -->	SMSF Establishment PDS
Download -->	SMSF Establishment Minutes
Download -->	SMSF Establishment Documentation summary
Download -->	Zip archive containing all of the above

## 6. Review your order

Your answers populate your documents. Click on the 'Review Answers' button to make sure you haven't made any mistakes.

Your answers will be shown in a PDF document.

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**Order No.(4181) Jane Jones Super Fund**

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## 7. Pay for your Order

Once you have reviewed your answers, you will need to pay for your documents.

Click on the 'Purchase and Download Documents' button.

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www.topdocs.com.au

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**Order No.(4181) Jane Jones Super**

**Payment and Download Ins**

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Download -->	SMSF Establishm
Download -->	SMSF Establishm
Download -->	Zip archive conta

**Secure Pay Payment Screen**

**SecurePay**

**Payment Details**

Name on credit card:

Credit Card Type:

Order No./Reference:

Amount:

**Credit Card Details**

Card No:

CVV No:

Exp:  /

Dialogs/SecurePay.asp?CurJobCost=234.00&CurJobNo=4181

## 8. Payment Options

You will automatically be assigned to pay via credit card.

Topdocs does offer a direct debit payment system if you would prefer not to use your credit card every time. For more details, please contact Topdocs on 1300 659 242.

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**Order No.(4181) Jane Jones Super Fund**

**Payment and Download Instructions**

**Online Delivery**  
If you have chosen 'Online Delivery' of your documents, you will need to click on the 'purchase and download documents' button. This will take you to a screen where you will confirm your acceptance for us to add this order to your direct debit account. After confirmation has been made, the download links at the bottom of the page will become live.

**Full Service Delivery**  
If you have chosen 'Full Service' Delivery of your documents, you will need to click on

Review Answers  
Email us about this Order  
View/Download Invoice  
Save and Exit

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Download -->	SMSF Establishment Documentation summary
Download -->	Zip archive containing all of the above

## 9. Download your Documents

### If you have ordered your documents as instant download'

Once payment is made, you will be able to download your PDF documents.

### If you have selected to receive your documents as 'full service'

Your order will be submitted to our office after payment and you will not be required to do anything more. At this point, click on the 'save and exit' button.

cked this site from downloading files to your computer. Click

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www.topdocs.com.au

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Download -->	Zip archive containing all of the above

## 10. Download your Documents

### If you have ordered your documents as instant download'

Some browsers will come up with a yellow pop up message at the top of the browser window as shown.

To download your documents, please right click on this message and select 'Download File'.

**Previous Orders**

Your previous orders are kept here for your future reference. You can download the invoice and answer summary for any previous order by clicking on the Order. If you have ordered any documents as 'Instant Download' you can also re-download these documents at any time by clicking on the Order. For more assistance, click on the 'help' button below.

OrderNo	Your Reference	Document Name	Completed	Status	Created	Modified	Created
4181	Jane Jones Super Fund	SMSF Establishment	07/08/2010 22:54	Completed	07/08/2010 22:42	07/08/2010 22:54	tdpa
4178	sdfasdf	Account Based Pension Reset & TRIS Reset		Pending	06/08/2010 17:25	06/08/2010 17:29	admin
4173	testing reset	Account Based Pension Reset & TRIS Reset	05/08/2010 08:57	Completed	05/08/2010 08:42	05/08/2010 08:57	admin
4171	kk	Account Based Pension Reset & TRIS Reset		Pending	04/08/2010 19:43	04/08/2010 19:43	admin
4170	tesing reset	Account Based Pension Reset & TRIS Reset		Pending	04/08/2010 19:23	04/08/2010 19:29	admin
4169	testing new tris	Account Based Pension Reset & TRIS Reset		Pending	04/08/2010 19:15	04/08/2010 19:15	admin
4150	test	Account Based Pension	30/07/2010 11:25	Completed	30/07/2010 11:20	30/07/2010 11:25	admin

## 11. View your Previous Orders

You can view all of your previous orders by clicking on the 'Previous Orders' menu at the top of the Document Portal.

To review a Previous Order, click on the order you would like to review. You will be taken to the end of order screen.