

SMSF DEED UPDATE SYSTEM – UPDATING YOUR DEEDS

ANNUAL DEED UPDATE SERVICE

Save time by having your clients' SMSF trust deeds updated automatically each year. Receive a new set of governing rules, product disclosure statement and trustee resolution by adding your Fund to our annual update service.

How does it work?

When you order a new SMSF establishment, or when you convert an existing deed to the Topdocs governing rules, you have the option to place that Fund on our annual deed update service.

To place your order, simply sign into the Topdocs online Document Portal at the **Topdocs website** - www.topdocs.com.au



If you haven't used the Topdocs Document Portal before, you can register for free at the **Topdocs website** by clicking on the **JOIN** button and following the prompts.

- Once you have signed in, select to either establish or vary your SMSF deed via the **New Order** menu tab.
- Your Fund Reference Screen will provide you with a number of options in relation to your order, including if you wish to add this Fund to our annual updates service.
- You don't have to pay for your annual updates in advance – your account instead is debited annually once you receive your new set of governing rules.
- Once you have elected to place your Fund on the annual update service, you can sit back and relax. Your deeds will now always be up to date!

New Order Details

Enter your reference for this order :

Type of service for this order - ☒ Full Service - \$374.00
☐ Instant Email Delivery - \$234.00

Annual SMSF Deed Updates

You have the option to add this Fund to your Annual SMSF Deed Update System. This service provides you with a new set of Governing Rules and new Product Disclosure Statement for the Fund each year, and costs \$99.00 (inc GST) per annum. [?](#)

I would like to receive annual updates for this Fund ☐

Order Additional Documents at the same time

You can order multiple documents using this one form. Select additional documents to order below. [?](#)

Available Additional Documents to Order	Full Service Price	Select
ABN and TFN Registration for the Super Fund	\$99.00	<input type="checkbox"/>
Register a Company to act as Trustee of the SMSF	\$672.00	<input type="checkbox"/>
Investment Strategy for the Super Fund	\$99.00	<input type="checkbox"/>
Initiate a Macquarie Cash Management Account	\$0.00	<input type="checkbox"/>

Total Order Amount: \$374.00

Image 1 | Annual Deed Update service tickbox

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Receiving your Annual Updates

- You will receive individual updates for all of your Super Funds that you have placed on the annual update service each year, on the anniversary date of your original order. So if you ordered a new Fund on 1 July 2014, you would receive an updated set of governing rules on 1 July 2015.
- By default, your new set of governing rules, product disclosure statement and trustee resolution will be sent to you by email each year. However, you can edit your preference to have your updates professionally printed, bound and delivered by express post. Alternatively, you can even have the annual deed updates emailed or delivered by express post directly to your client. The choice is yours!

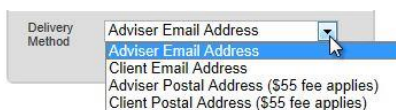


Image 2 | The Deed update delivery options

Keeping Track of your Deeds

You can see a complete list of your Topdocs Super Funds, including the date the deed was last updated, by clicking on the **Your Topdocs Deeds** menu item located under the **SMSF Deeds Updates menu tab** when you are logged into the Topdocs Document Portal.

When you highlight a Fund in the list, the details are displayed including the current and prior governing rules and current member and trustee details. You can also see which of your Funds are receiving annual updates, and which are not.

Your Super Funds

Adviser Selection: All Adviser Annual Updates: ALL

Fund Name	Adviser	Date of last update	Annual Updates	Update now on Demand
Dellsby Self Managed Super Fund	John Smith	03/07/1999	No	<input type="checkbox"/>
Smith Jones Super Fund	John Smith	06/09/2002	No	<input type="checkbox"/>
JJ Jones Super Fund	John Smith	01/07/2005	No	<input type="checkbox"/>
Classic Super Fund	John Smith	07/04/2006	No	<input type="checkbox"/>
Peter Pan Super Fund	John Smith	25/08/2006	No	<input type="checkbox"/>
Jeremy Super Fund	John Smith	01/05/2009	No	<input type="checkbox"/>
Phils Superannuation Fund	John Smith	20/12/2012	Yes	<input type="checkbox"/>
Phils Superannuation Fund	John Smith	20/12/2012	Yes	<input type="checkbox"/>
Mawsby Super Fund	John Smith	21/12/2012	Yes	<input type="checkbox"/>
Greenbay Superannuation Fund	John Smith	01/01/2013	Yes	<input type="checkbox"/>
KP King Super Fund	John Smith	02/01/2013	Yes	<input type="checkbox"/>
John Smith Family SF	John Smith	30/01/2013	Yes	<input type="checkbox"/>
Richard Carter Superannuation Fund	John Smith	30/01/2013	Yes	<input type="checkbox"/>
John Smith Family SF	John Smith	30/01/2013	Yes	<input type="checkbox"/>
Richard Carter Superannuation Fund	John Smith	30/01/2013	Yes	<input type="checkbox"/>

Page: 1 of 1 Go Page size: 15 Change Item 1 to 15 of 15

Update Selected Funds

Richard Carter Superannuation Fund

Current Governing Rules

[Deed & Resolutions](#)

Upload

Fund Details

Establishment Date: 19/06/1992

Governing Law: ACT

Member Name: Richard Carter

Company Name: Carter Super Pty Ltd

Company ACN: 000 000 001

Director Name: Richard Carter

Image 3 | Full list of your Topdocs deeds located in the Document Portal

More information

For further information about our annual deed update service, please contact the team at Topdocs on 1300 659 242.