

SMSF DEED UPDATE SYSTEM



- Easily manage all your super fund deeds in a single online location
- Forget order forms. We integrate with BGL, Class Super and SuperMate to make updating your deeds easy
- Update a deed automatically each year or instantly at your discretion

The Topdocs SMSF Deed Update system provides a powerful solution for keeping your trust deeds up to date.

Topdocs makes it easy to keep your SMSF deeds up to date through our online Document Portal.

With easy to use tools to convert your deeds to Topdocs, and convenient options to keep them up to date going forward, ensuring your client's have the most up to date governing rules has never been easier.

Easy to use conversion tools

Updating your deeds **does not have to be a time consuming process!**

We make the process of converting your deeds to Topdocs quick and easy through our range of deed conversion tools.

Our integrations with BGL Simple Fund and Simple Fund 360, Class Super and SuperMate enable you to order your deed updates without completing a single application form!

Importantly, because we provide individual legal review of every deed we update, we'll compare your fund

details as per your software with the Fund's deed, to ensure your documentation is always valid and effective.

Single online location

Every deed you establish or convert to Topdocs is stored in your online account in a single location. The details of every Fund, including the current member and trustee details along with the Fund's current and prior governing rules, are just a click away.

Annual or instant updates – your choice

Unique to Topdocs, our online Portal lets you choose how you would like to keep your trust deeds up-to-date going forward.

Using the system, you either elect to receive annual updates for your Funds, or, alternatively, you can instantly update selected deeds on the spot at your discretion.

The choice is yours.

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Quick and easy updating

Regardless of which method you choose to keep your deed up to date, it's quick and easy. Choose the annual update service and your deeds are automatically updated each year.

Alternatively, choose the instant update option and, whenever you wish to update your deeds, simply log into the Portal, select the deeds you wish to update, and they'll be updated on the spot!

No more order forms

Updating your deeds can be a time consuming process, especially if you administer a lot of Funds. But with Topdocs, once you do the initial conversion to our governing rules, you will never have to complete an order form for your deeds ever again! With all your deeds listed in a single location, simply select a Fund, click update, and you're done!

Delivery options

When you update your Topdocs deeds you have the option to either receive your updates via email or to have them professional printed and bound.

Ongoing compliance

The core purpose of our SMSF Deed Update system is to assist you in keeping your clients' trust deeds up-to-date and compliant. The system enables you to clearly see the status of each Fund and then easily update it where required.

Exceptional Topdocs SMSF Deed

Establishing or converting to the Topdocs SMSF deed is a wise move. Regarded as one of Australia's most strategically planned and structured SMSF Deeds, the Topdocs deed is designed specifically for today's complex SMSF environment. The Topdocs SMSF deed is supported by Topdocs Legal Pty Ltd and a panel of specialist SMSF lawyers and advisers.

Technical advice and support

As part of the Topdocs service, you have access to our legal, technical and documentation experts to discuss any queries you might have regarding the Topdocs deed or the SMSF Deed Update system. Simply call us on 1300 659 242.

Marketing and client material

Topdocs provides marketing material to assist you explain to your clients the importance of keeping a SMSF trust deed up-to-date. Pro-forma client letters, brochures and technical materials relating to updating SMSF deeds can be found in the **Converting your Deeds to Topdocs** page in the Topdocs Document Portal.

More information

Should you have any queries or require more information, please contact the team at Topdocs on 1300 659 242.

Key Features



Easily convert other deeds to Topdocs



All your clients' deeds are online



You control when a deed is updated



Updating a deed takes a mouse click



Auditing is easier and faster