

SOLUTIONS FOR FINANCIAL PLANNERS

- High-quality SMSF, corporate and estate planning documentation
- Easy to use online ordering facilities that can be accessed anytime, anywhere
- Free technical and legal support for general and strategy queries
- Third party integration with XPLAN, Class Super and SMSF administration platforms
- Accredited online professional development training

Our combination of quality documents, easy ordering facilities and expert technical support provides a total document ordering solution for financial planners.

Topdocs is a leading supplier of self-managed super fund (SMSF), corporate, estate planning, and other documentation. We complement our quality documents with expert advice, support and accredited technical training to provide you with a complete solution.

Document solutions

Topdocs is renowned for the quality of our documents. Meticulously developed and maintained by our in-house legal and SMSF experts, our documents are always up-to-date and provide the best strategic provisions.

The key features of our document solutions are outlined below.

Self Managed Superannuation

Our SMSF solution for financial planners includes:

- The most comprehensive suite of quality SMSF documentation available
- An easy to use online document ordering portal

- Free, quality SMSF and documentation telephone support and legal advice
- The ability to pre-populate your orders directly from XPLAN and Class Super
- Free online SMSF professional development training with FPA and SMSFA accreditation
- The most advanced online SMSF deed update system in the market for managing, tracking and updating clients' trust deeds
- Individual letters of legal sign off by Topdocs Legal Pty Ltd on all documents with any legal risk
- Integration with third party SMSF administration platforms

SMSF Borrowing

As market leaders in the area of SMSF borrowing, we provide:

- A comprehensive suite of high quality SMSF borrowing documentation that is guaranteed to be accepted by all lenders

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- Free, quality SMSF borrowing telephone support and legal advice
- Various lender contacts
- Individual letters of legal sign off by Topdocs Legal Pty Ltd confirming compliance with the SIS Act
- SMSF borrowing professional development videos with FPA and SMSFA accreditation
- A range of technical and marketing materials

Estate Planning

Our estate planning includes:

- A broad range of high quality estate planning documentation
- Comprehensive fact-find and technical documentation
- Quality legal and technical support by our in-house lawyers
- Support to ensure the financial planner maintains control of the client process and remains at the hub of their clients' affairs
- Initial and ongoing training to provide the financial planner with the knowledge and confidence to communicate effectively with clients in relation to estate planning matters
- Video-conferencing facilities to provide financial planners and their clients with access to high quality legal advice whenever and wherever they might need it

Companies and Trusts

Our solution for Company and Trusts includes:

- Feature-rich Discretionary, Fixed and Non-Fixed Unit and Hybrid Trust documentation

- A dynamic link to ASIC so companies can be registered instantly
- In-house trust specialists that are available for advice and guidance as part of the service

Agreements

Our growing list of agreements includes:

- Buy Sell agreements which are supported by our in-house legal team
- Loan documents including Division 7A, SMSF and general loan agreements

Innovative ordering and third party integration

Ordering a document is simple and straight-forward using the Topdocs Document Portal. You can order a document quickly online anytime, and have it delivered immediately via email or have it professionally printed, bound and delivered by express post.

We integrate with a range of industry software applications such as XPLAN, Class Super and various SMSF administrator systems so document order forms can be automatically prefilled with key client data.

To further streamline the ordering process, our online ordering system lets you order multiple documents (for example a SMSF and corporate trustee) using a single order form and you can populate your order form using answers from previous, related orders.

Expert advice, training and legal services

The Topdocs team includes a dedicated group of senior lawyers, SMSF specialist advisers and accountants, all with comprehensive SMSF, company, trust, estate planning and succession planning expertise. As part of the service, these experts are available to answer any technical queries you may have.

Technical and legal support

To keep you up-to-date with the latest legislation or changes in the industry, we provide a range of technical newsletters, articles and FAQ documents.

Professional development services

We provide a range of CPD accredited (SMSFA and FPA) technical presentation videos to develop and maintain your industry knowledge. These videos are developed and presented by our in-house experts; they're professionally filmed and provide a flexible and convenient way to keep up-to-date.

Legal assurance – reducing risk

Documents that involve significant legal risk such as SMSF deed upgrades, trustee changes, binding death benefit nominations (BDBN) and SMSF loan documents are reviewed by our legal team and are provided with individual letters of legal assurance.

More information

To learn more about how Topdocs can support your firm, please visit the [financial planner solution page on the website](#) or call us on 1300 659 242.