

# SOLUTIONS FOR SMSF ADMINISTRATORS

- 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
- White-label solutions to create your own online document portal
- Accredited online professional development training

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

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 dealer groups includes:

- The most comprehensive suite of quality SMSF documentation available

- An easy to use online document ordering portal that provides white label functionality
- Free, quality SMSF and documentation telephone support and legal advice
- The ability to pre-populate your orders directly from XPLAN and Class Super
- 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

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## 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
- 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
- Online SMSF borrowing professional development videos with FPA and SMSFA accreditation
- A range of technical and marketing materials

## Companies and Trusts

Our solution for Companies 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
- Facilities to order Trust and Company documents together at the same time

## 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 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.

## White-label solutions

Promote your own brand. The Topdocs Document Portal can be fully white-labelled or co-branded with the Topdocs brand to represent your dealer group's corporate identity.

The Document Portal can then be embedded into your website or adviser intranet to provide a seamless environment for ordering documents.

## 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.

## SMSF Administrator Solution



High quality, up-to-date documents



Easy online ordering systems



Free technical advice and support



3<sup>rd</sup> party integration with industry systems



Excellent profit margins

## Legal assurance

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.

## Delivering profitability

Topdocs' pricing model provides excellent profit margins for dealer groups as well as competitive pricing for advisers.

## More information

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