

SELF MANAGED SUPER FUND SET UP INCLUSIONS AND BASIC FLOW CHART

SMSF Setup & Custodian (Bare) Trust Setup

Setup Package includes:

- Company Registration with ACN (Corporate Trustee for SMSF)
- Company Constitution
- Director, Secretary, Public Officer and Shareholder documentation
- SMSF Trust Deed Documentation
- Investment Strategy Document
- Minutes and resolutions
- ABN & TFN Registration
- Facilitate Super Rollover Paperwork
- Liaise with Superfunds regarding rollover (where authorisation is provided)
- Binding Death Agreement Nominations
- Assistance with SMSF Bank Account Setup
- Electronic Service Address setup (for employer super contributions)
- Bound SMSF Trust Deed and Company Constitution

Plus, services include the following Bare Trust setup items:

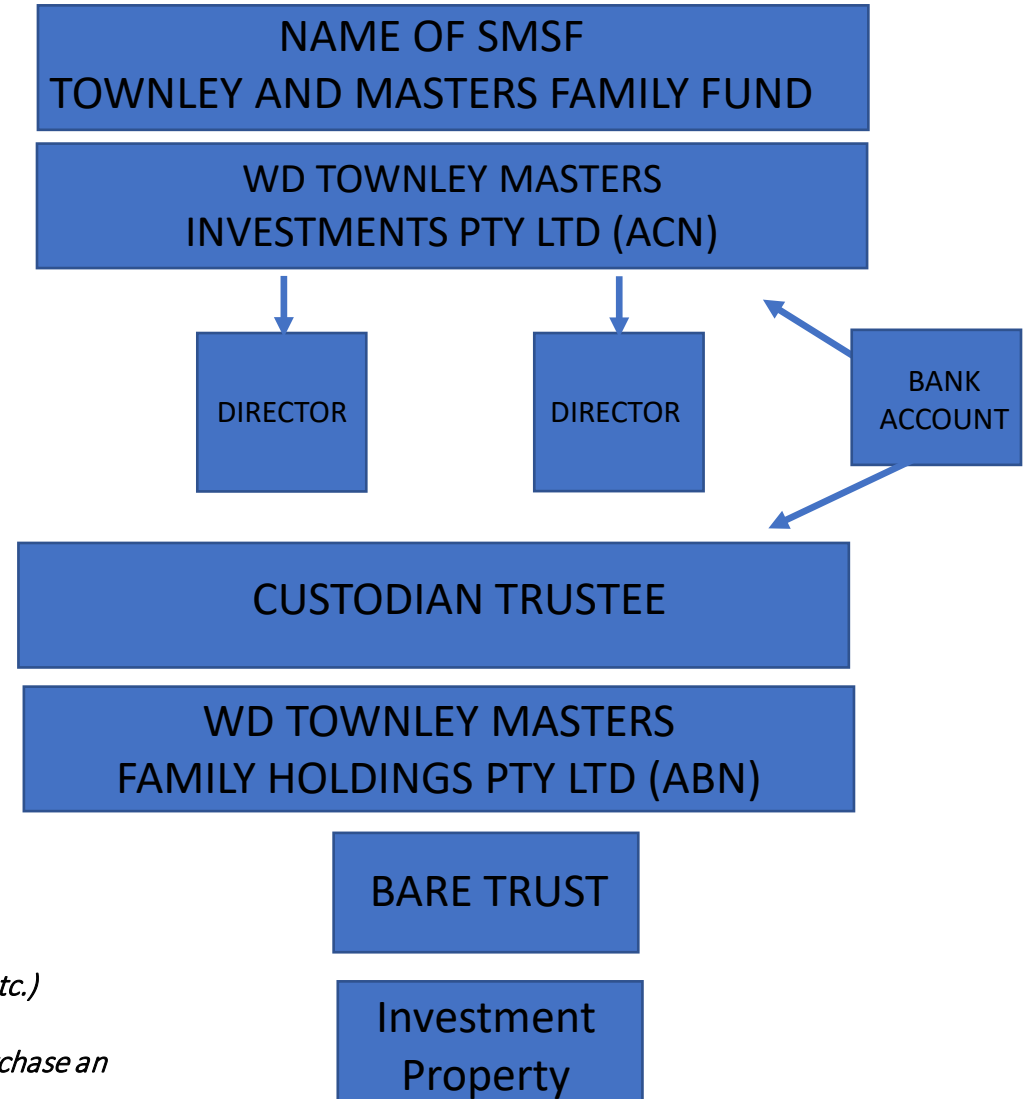
- Company Registration with ACN (Corporate Trustee for Bare Trust)
- Company Constitution
- Director, Secretary, Public Officer and Shareholder documentation
- Bare Trust Setup with Trust Deed
- Bound Hardcopies of Bare Trust Deed and Company Constitution
- Minutes and Resolutions
- Compliance documents

This package includes liaising with all parties involved with the transaction (e.g. brokers, solicitors, accountants etc.)

Documents will be provided in hard copy, bound and presented in tabbed folders.

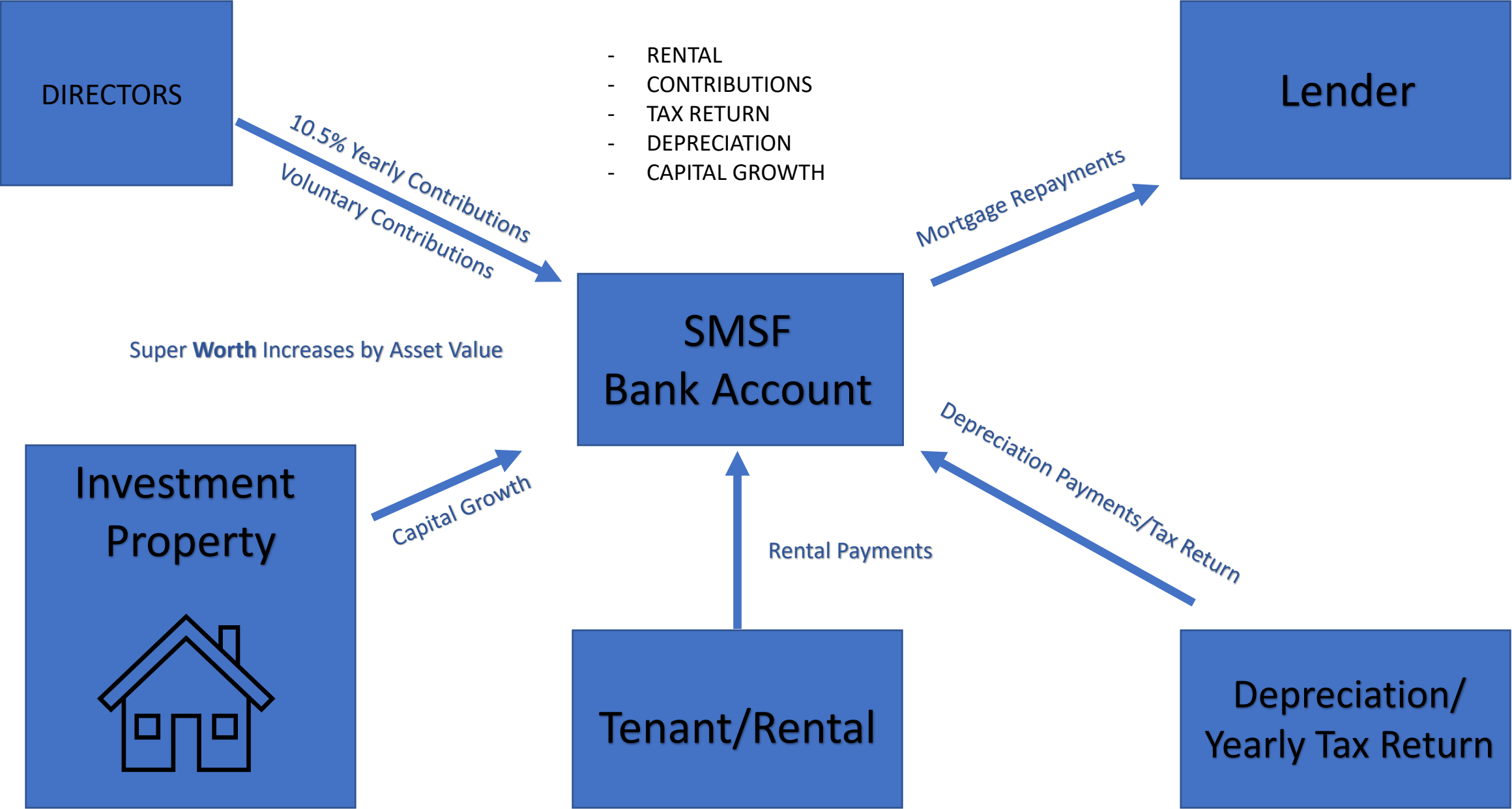
This is a complete package which will ensure that you are setup with a self-managed superfund and ready to purchase an investment property through limited recourse lending.

Ongoing accounting and ASIC costs are not included in the above package



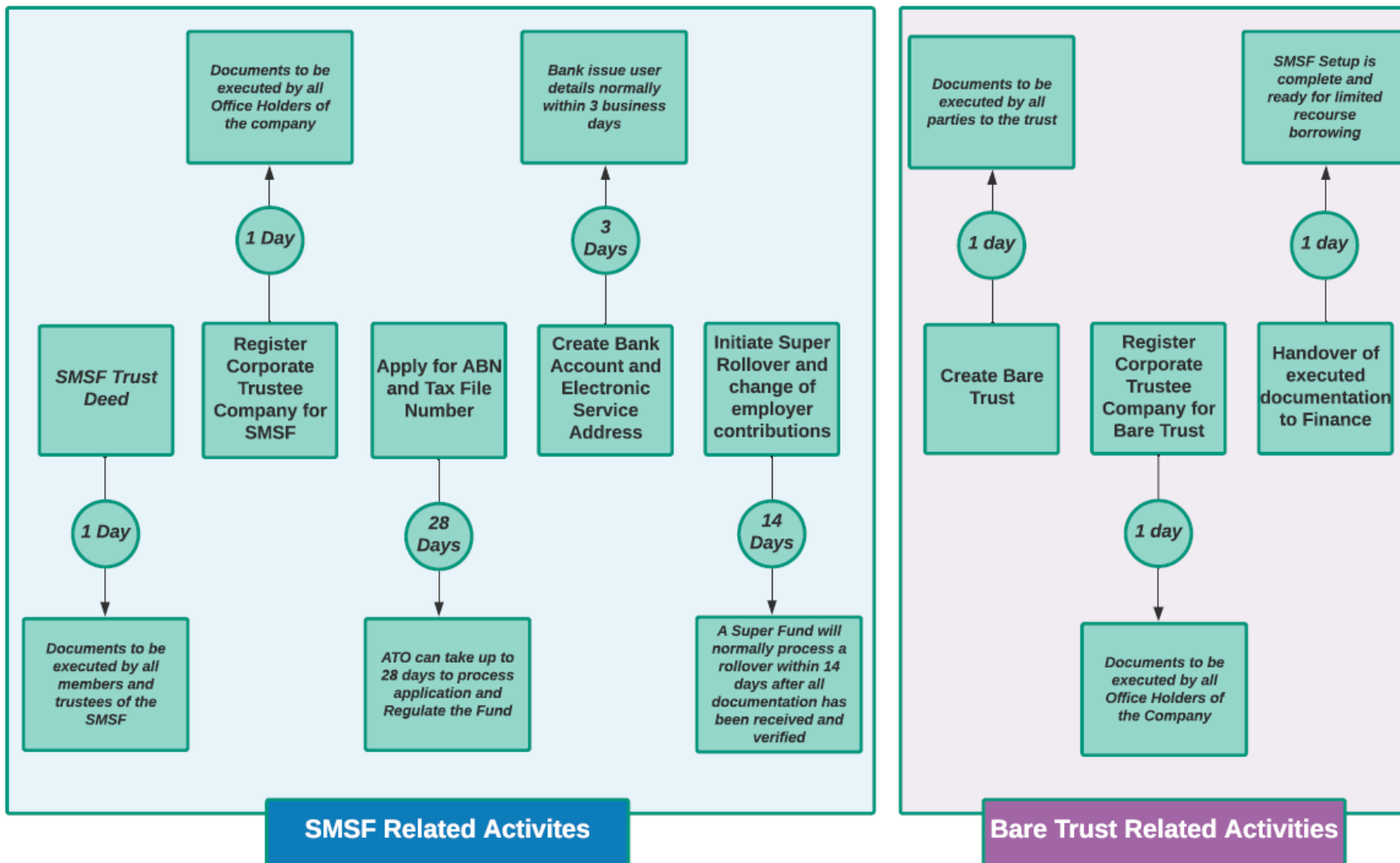
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SELF MANAGED SUPER PROPOSED EXTRA STREAMS
OF INCOME INTO THE FUND ACCOUNT CHART



SELF MANAGED SUPER FUND TIMEFRAME FLOW CHART

OVERVIEW - Self Managed Superfund Setup



SELF MANAGED SUPER FUND PROPOSED INVESTMENT PROPERTY STRUCTURE

Item	Proposed Amounts (\$) Property 1
Purchase Price	\$ 411,500.00
Mortgage (Based on 76% Lend)	\$ 312,740.00
Interest Rate (SMSF RATE)	6.59% I/O
Indicative Monthly Repayments	\$ 1,717.46
Rental Monthly	\$ 1,716.00 (\$ 395 per week from 10/10/22)

Projected Costings for SMSF Investment Set up –

Item	Costings
24% Deposit	\$ 98,760.00
Stamp Duty	\$ 14,186.44
Legal Fees	\$ 2,500.00
Adjustments	\$ 2,000.00
SMSF Set up	\$ 11,000.00 + GST
CWA Portfolio	\$ 29,990.00 + GST
Buffer	\$2,000.00
TOTAL	\$164,436.44

Indicative Numbers



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