


Products to assist with your SMSF practice

	Price	Qty
Monthly Newsletters — these complementary newsletters are full of useful tips and traps as well as detailing changes in the law, upcoming seminars, new products, etc.	Free	—
Anti-Detriment Memo — the most detailed explanation regarding how to utilise a section 295-485 (also known as an anti-detriment) deduction ever written. This is a must read for all serious SMSF advisers and trustees, especially those with an interest in SMSF estate planning. It contains the information you need to become an expert on anti-detriment deductions, including detailed commentary on the law, practical guidance when actually claiming such a deduction, detailed examples and explanations, the latest from the regulators, template minutes to implement and invaluable tips that come from our years of hands-on experience.	\$550	—
		
Gearing Unit Trust Kit — provides valuable guidance and practical tools for SMSFs that invested in pre-99 unit trusts. All advisers with SMSF clients and pre-99 unit trusts must read this before July 2009! It outlines options for dealing with the 30 June 2009 deadline and explains how further investments can be made before and after that date. It includes sample SMSF and unit trust resolutions, various unit trust forms, a detailed memo and more.	\$440	—
Investment Strategy Kit — written super fund investment strategies are a legal requirement and also benefit and protect trustees. They also can prevent advisers from being sued. This kit (25+ pages) is the most comprehensive and practical explanation of how to draft an investment strategy available. It also includes three detailed sample strategies in MS Word format: 1: balanced, diversified strategy; 2: real estate only strategy (member in pension mode); and 3: gearing strategy to acquire real estate.	\$440	—
Investment Reserving Kit — provides valuable guidance on establishing and managing investment reserves, including the taxation implications of allocating reserves in respect of contributions caps. Also included are templates of resolutions to establish reserves (including a reserving strategy), review reserving strategy and allocate reserves.	\$440	—
Pension Kit: Commencement — contains all the template documentation and instructions necessary to commence a pension. Included in each kit is a PDS, detailed trustee resolutions, member application, member summary, instructions regarding appropriate ATO forms, commentary on segregation and more.		
Commence an account-based pension	\$440	—
	*	
Commence a transition to retirement income stream:	\$440	—
	*	
Commence a market linked pension (term allocated pension)	\$440	—
	*	
Pension Kit: Conversion — contains all the template documentation and instructions necessary to conversion from one type of pension to another, including a PDS, trustee resolutions, member application, member summary, and more.		
Convert an allocated pension to an account-based pension	\$440	—
	*	
Convert a transition to retirement allocated pension to a TRIS	\$440	—
	*	

Pension Kit: Roll-Back (Commutation/Termination) — this is vital for those who wish to effectively add to the capital supporting a pension or merely end a pension. Contains all the template documentation and instructions necessary to terminate a pension and roll the resulting lump sum back into the fund. Includes letter to the trustee, detailed trustee resolutions and letter to the member.

Roll-back an ABP, AP, MLP (TAP) or TRIS	\$330	___
	*	
Roll-back a defined benefit pension (eg, lifetime complying or flexi pension)	\$330	___
	*	

SMSF to SMSF Roll-Over Kit — contains all the template documentation and instructions necessary to roll-over a lump sum from one SMSF to another. Includes letters from member to trustees, detailed trustee resolutions, letters from trustees to member and detailed guidance on appropriate ATO forms.	\$330	___
	*	

Crystallisation Kit — provides practical guidance, worked examples and template documentation to assist SMSF trustees and their advisers in calculating and recording the crystallised pre-July 83 component making-up a member's superannuation interest. This kit is especially valuable for those with interests that crystallise after 2007.	\$330	___
---	-------	-----

SMSF Borrowing Memo — This 15+ page publication provides guidance on the new 'instalment warrant'-type borrowing arrangements which came into effect in September 2007 covering the latest from the ATO, opportunities, strategies, tips, traps, rules relating to SMSFs borrowing, tax implications (income tax/CGT, stamp duty and GST), the in-house asset exemption, frequently asked questions and much more. **If you purchase this memo and then instruct DBA Lawyers to document an SMSF borrowing arrangement, we will decrease the invoice for the SMSF borrowing arrangement by \$220**	\$220	___
---	-------	-----

Trustee Compliance Kit — helps trustees ensure that their SMSFs comply with relevant laws with a strong emphasis on proper minute keeping. Includes a detailed memo discussing how and when to make minutes as well templates of 20 of the most popular trustee minutes.	\$150	___
---	-------	-----

SMSF & Estate Planning Report — Contains 30+ pages of valuable guidance and tips regarding SMSFs and estate planning. Topics covered include how death benefits may be paid out, taxation treatment, lump sum versus pension options, deciding who to pay, binding death benefit nominations, checklist for SMSFs upon death and much more.	\$99	___
--	------	-----

Name _____ Firm _____

Street Address _____

Mailing Address _____

Phone _____ Email _____

* Prices quoted are for single-use licences only (ie, can only be used to commence/convert/roll-back etc **one** pension). Multi-use licence details are available on request.

For further information, please visit our website at www.dbalawyers.com.au or call us on (03) 9682 0903.