



PRODUCT GUIDE

Helping you to set up the right business structure online

www.trustdeed.com.au

WELCOME

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

CONTACT

Suite 3.04, Level 3,
29-31 Solent Circuit
Baulkham Hills
NSW - 2153

Phone:
(02) 9684 4199

Email:
sales@trustdeed.com.au

ABOUT US

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

OUR MISSION

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.





CONTENTS

Welcome	2
Contact	2
About Us	2
Company	4
Business Name	5
SMSF Deed	6
SMSF Tools	7
SMSF Borrowing	8
Actuarial Certificate	9
QS Report	10
Discretionary Trust	11
Unit Trust (Fixed)	12
Jobs	13
Online SMSF Audit	14
Our Fees	15



COMPANY

Company Registration

We offer company registration services for an Australian propriety company, the most common and popular type of company, through our innovative online portal directly connected to ASIC servers as we are a ASIC registered agent. It takes less than 20 minutes to register a company and all legally required documents including "Certificate of Registration" are promptly emailed to you.

The following documents are provided when you establish a company. We email the following six Microsoft word for windows documents to you.



- Minutes & Consents
 - Consent to act as Director, Secretary & Public Officer
 - Consent of Occupier to use the office as Registered Office
 - Application for Shares by shareholders
 - Minutes of first meeting of directors
 - Share Certificates for each class of shares for each shareholder with issue price details.
 - Company Share and transfer register for members with each class and issue price details
- Constitution of the Company
- Execution page of Constitution
- Certificate of Registration of company (A.C.N – from ASIC)
- Instructions Sheet on what to do next. E.g. How to register the company with ATO and open company bank account etc
- Our Invoice

Company Constitution

You can order a company constitution from us for your existing company. There are circumstances where you may want to order a new constitution which may include but not limited to below:

- You have lost your constitution or;
- You want to adapt to our constitution instead of replaceable rules or;
- You want to update to our constitution from your old constitution, including for one member company, or;
- You want to update from older Memorandum & Articles of Association

As you place the order, our system instantly generates a constitution for your existing company and all related legally required company documents & email it to you.

If you're a service provider, we also offer bulk update option where you can get updates for your multiple clients at a special discounted price.



BUSINESS NAME

Business Name Registration

We offer you online access to make an application for the registration of a business name on the ASIC register. By using our fully automated system you can complete an application for a business name registration in less than 10 minutes. Business names can be registered for 1 year or 3 years.

Division 7A Agreement

Division 7A is part of the Income Tax Assessment Act 1936 which relates to loans made by companies or trusts to shareholders or associates of shareholders. It is an anti-avoidance provision which aims to prevent tax free distributions of company profits as loans which either remain outstanding or are forgiven altogether.

Our 'Division 7A' loan agreement conforms to required criteria and can be used in the following circumstances.



- Where a Pty Ltd company makes a loan to its shareholder or an associate of a shareholder;
- Where a company has an unpaid present entitlement from net income of a trust and a loan is made by the trust to a shareholder or an associate of shareholder of such company.

This loan agreement will cover all the loans made by company to a shareholder.



Where do we see the business going?



Why does our business exist?



What do we want to accomplish with our marketing strategy



How will we accomplish our marketing objectives?



SMSF TOOLS

Our online system instantly generates all legally required documents for smooth running of your SMSF. It takes less than 20 minutes to receive the documents in your email. You can buy the documents listed below on our website 24/7.



- Account Based Pension Documents including relevant minutes, PDS and Pension Agreement
- Convert Existing Pension To Account Based Pension including relevant minutes, PDS and Pension Agreement
- Deed of Confirmation Self Managed Superannuation Fund
- Change of Details - Add Members to your SMSF
- Change of Details - Delete Members from your SMSF
- Change of Details - Change Individual Trustees to a Corporate Trustee
- Change of Details - Change Corporate Trustee to Individual Trustees
- Change of Details - Change Corporate Trustee to Corporate Trustee
- Declaration of Trust / Acknowledgement of Trust
- SMSF Loan Agreement
- Binding Death Nomination



ACTUARIAL CERTIFICATE

A Self managed super fund can claim exemption from paying tax on income from those assets (pension assets) which are supporting an income stream, such as account based pension being paid to a member of the fund. This income is called the Exempt Current Pension Income (ECPI).

Exemption from income tax is not automatic a fund must obtain an actuarial certificate before the fund can be audited and lodge its income tax return where the pension assets are mixed (un-segregated) with non pension assets (accumulation assets). A self managed super fund requires an actuarial certificate for each year when the pension assets are un-segregated.



By using our online system you can obtain preliminary percentage in less than 20 minutes calculated by our system at any time of day. This percentage can be used by the accountant to finalize accounts; however, is not the final certificate which the fund needs to claim exempt current pension income; the actual certificate will be emailed after full review from our actuary. In most cases if the order is placed before business midday (Australian EST), you will receive an email of the full Actuarial Certificate on the same day if there are no complexities. We are the only ONLINE Actuarial Certificate providers who offer FULL back up support at NO ADDITIONAL COST by our support centre (02 9684 4199) who can help you to complete our online form. We do not use a confusing online excel sheet for your data entry, like other providers, we have developed our own "Question and Answer Style" in-house program which collects data and calculates exempt pension income for your fund.



QS REPORT

You can order a Quantity Surveyor (QS) Report on our system to claim depreciation in your income tax return for your investment property (residential or commercial) anywhere in Australia. Our tax depreciation specialists will visit your property for a full physical inspection so that you can claim the maximum deduction and email you the report within 10 working days.

Below are some of the features of our QS Report.



- Our QS report commences from the settlement date of the investment property
- Our depreciation report is valid for the lifetime of the investment. However, it is recommended you update your schedule if capital works are undertaken on the property or assets in the house are replaced
- Our quantity surveyor report also includes a schedule of depreciable assets (capital allowances) and a separate schedule for plant for the decline in value of depreciable assets and is for the whole of life of the property (usually 40 years)
- We provide a report which includes your claim via either the prime cost or diminishing value method. Both methods are based on the effective life of the asset
- Reports are prepared by a specialist depreciation firm: Deppro; - who are tax agents and members of Australian institute of Quantity Surveyors (AIQS), with specialist expertise in preparing depreciation schedules for investment properties
- Our unique electronic registration technology means we can offer the fastest service possible at a very reasonable price



DISCRETIONARY TRUST

A family discretionary trust is where the beneficiaries are all predominantly family or related members of the same family and the trustee has full discretion which beneficiary gets which distribution portion of income or capital of the trust.

Our Discretionary Trust Deed is emailed to you instantly upon receiving the order. The email delivery includes:



- Trust Deed of your Discretionary Trust Deed
- Consents for Individual trustees or consent of Directors of the trustee company to act as trustees of Discretionary Trust
- Minutes between Settlor / Trustees to set up the discretionary trust deed
- Instruction sheet on
 - how to open bank accounts;
 - broker accounts;
 - apply for Tax File Number Australian Business Number;
 - how to get the trust deed stamped and;
 - Notes on features of trust deed including tax benefits and
 - "What to do next".



UNIT TRUST (FIXED)

A fixed unit trust is where the unit holders, who are all predominantly un-related members of two or more separate families getting together to hold an asset together (usually a large property or shareholding) or run a business together. The trustee has no discretion on which unit holder gets which distribution portion of income or capital of the trust. All income and capital is distributed according to unit holding.

Our email delivery service includes:

- Trust Deed of your Fixed Unit Trust
- Minutes
 - Consents for Individual trustees or consent of Directors of the trustee company to act as trustees of Unit Trust;
 - Minutes of Trustees to set up the fixed unit trust;
 - Application for Units for each Unit Holder;
 - Certificate of Units;
 - Register of Unit Holders ;
 - Register of Issued Units and;
 - Register of Transfer of units
- Instruction sheet on
 - What to do next” to ensure that the trust deed is set up legally;
 - How to open bank accounts; broker accounts;
 - Apply for Tax File Number Australian Business Number;
 - How to get trust deed stamped and;
 - Notes on features of trust deed including tax benefits
- Our Invoice
- Execution Page of Trust Deed



UNIT TRUST

A unit trust is a trust where the rights of the beneficiaries (unit holders) to income and capital are fixed. This is in the sense that they are not subject to any discretions on the part of a trustee, and are unitized, in the sense that those rights are divided amongst the beneficiaries based on how many units have been issued to them.

The email delivery includes:

- Trust Deed of your Unit Trust
- Minutes
- Consents for Individual trustees or consent of Directors of the trustee company to act as trustees of Unit Trust;
- Minutes of Trustees to set up the unit trust:
- Application for Units for each Unit Holder:
- Certificate of Units:
- Register of Unit Holders :
- Register of Issued Units and:
- Register of Transfer of units
- Instruction sheet on
 - What to do next” to ensure that the trust deed is set up legally;
 - How to open bank accounts; broker accounts;
 - Apply for Tax File Number Australian Business Number;
 - How to get trust deed stamped and;
 - Notes on features of trust deed including tax benefits



JOBS

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.



Lorem Ipsum is simply dummy text of the printing and



ONLINE SMSF AUDIT

Introducing Australia's first SMSF online auditing portal which helps you to complete an SMSF audit in less than half the time compared to traditional auditing methods. This fully compliant auditing software complies with all Australian auditing standards including SMSF GS009 and is designed and caters to current SIS Act, SIS Regulations & Income Tax Act.

It is an online working paper system with user picked 610 points checklist and meets and exceeds all professional standards. The audit program automatically generates and stores all reports from our pre-made templates, such as audit report, management letter, paper contravention report, invoices etc.



What you get is a complete document management system which encompasses a web based auditing tool that creates efficiency & quality for each SMSF which you audit. This software provides you "Peace of mind" and assurance that nothing is left out from a top quality SMSF audit as the online audit program includes a very comprehensive checklist and financial auditing tools such as closing share prices and dividend payment history of listed companies and managed funds.

Add to that the convenience of conducting an SMSF audit anytime from anywhere 24/7 as it establishes a seamless communication system where Trustees can upload documents for the accountant; accountant can then prepare and upload financial statements for the auditor to complete his audit.

A Totally secure document management system which stores your SMSF permanent documents and yearly audit evidence & reports on a 128 bit secured system with ability of white labelling the software where auditors or accountants can integrate our audit tool within their own website.



IMPORT

Accountants, Trustees and Audit team can upload via a drag and drop functionality and access permanent documents, accounting data file and audit evidences anywhere, anytime and from any device.

Being a white label product, Trustees and Accountants can visit Auditors website to communicate and upload audit evidence for you to conduct an online audit and collect all audit reports.



ANALYSE

Every audit is conducted completely on a secured website using a comprehensive audit checklist. This checklist is user picked depending on the circumstances of the fund (for example it ignores all pensions questions when the fund is in accumulation phase).

Answer to each checklist question is available as a premade template with helpful pointers to SISA, SISR, AAS, GS009 etc which not only makes the audit fully compliant but meets and exceeds all professional standards.



REPORT

The software builds all reports from premade templates that automates and creates the issuance of audit reports and management letter etc. with your firm's letterhead with digital signature.

The system then emails and stores these reports for future downloads for all interested parties. It also automatically prepares paper auditors contravention report from templates which saves repeating tasks & cuts audit time.

Be a smart auditor and save time, complete a top quality audit in less than half the time



OUR FEES Includes GST

Our Services	Phone: (02) 9684 4199	Price <small>(Email Only)</small>	Price <small>(Email & Paper Copy) Delivered anywhere in Australia</small>
Instant Proprietary Company (including \$469 ASIC Fees)		\$555	\$620
Constitution, Consents & Registers for already registered Company		\$125	\$190
Division 7A Agreement		\$55	\$120
Business Name Registration			
Business Name Registration – 1 Year		\$75	N.A.
Business Name Registration – 3 Years		\$126	N.A.
SMSF Deeds			
New SMSF Trust		\$125	\$180
Bundle - New SMSF Trust + Trustee Company (Full Price)		\$110	\$165
SMSF Trust Deed Update (Amend all your current governing rules to ours)		\$125	\$180
SMSF Unlimited Updates for Five Years Sold together with "New SMSF" or with "Update your SMSF Trust Deed"		\$165	-
New SMSF Trust Deed Or SMSF Trust Deed Update + Unlimited Updates for Five Years		\$290	\$345
Trust Deeds			
Discretionary Family Trust		\$125	\$180
Bundle - Discretionary Family Trust + Trustee Company (Full Price)		\$110	\$165
Unit Trust		\$125	\$180
Bundle - Unit Trust + Trustee Company (Full Price)		\$110	\$165
Fixed Unit Trust (Land Tax Deed or SIS Reg. 13.22 C Trust Deed)		\$275	\$330
Bundle - Fixed Unit Trust + Trustee Company (Full Price)		\$245	\$300
SMSF Tools			
Account Based Pension Documents		\$165	\$220
Deed of Confirmation (for Lost SMSF Deed)		\$220	\$275
Adding a Member OR Deleting a Member		\$220	\$275
Change Individual Trustee to Corporate Trustee		\$220	\$275
Bundle - Change Individual Trustee To Corporate + Trustee Company (Full Price)		\$200	\$255
Change Corporate Trustee to Individual Trustee		\$220	\$275
Change Corporate Trustee to Corporate Trustee		\$220	\$275
Bundle - Change Corporate Trustee To Another Corporate Trustee + New Trustee Company (Full Price)		\$200	\$255
Declaration of Trust		\$165	\$220
SMSF Loan Agreement		\$110	\$165
Binding Death Nomination		\$55	-
SMSF Borrowing			
Borrowing From External Lender (Bank)		\$165	\$220
Bundle - Property Custodian Trust Deed + New Trustee Company (Full Price) (Borrowing From External Lender - Bank)		\$140	\$195
Borrowing From Related Party		\$495	\$550
Bundle - Property Custodian Trust Deed + New Trustee Company (Full Price) (Borrowing From Related Party)		\$445	\$500
Actuarial Certificate			
Actuarial Certificate – Sec 295-390 of the ITAA 1997		\$97.50	-
Property Inspection			
Quantity Surveyor Report		\$495	-
Jobs			
Advertise your Vacancy		Free	-

All Prices are including GST in AUD



Register as a
New Customer



Log on
to Website



Select
Product



Answer
Simple Questions



Make
Payment



Documents
Emailed to You



All in
20 Minutes

COMPANY

BUSINESS NAME

SMSF DEED

SMSF TOOLS

SMSF BORROWING

ACTUARIAL CERTIFICATE

QS REPORT

DISCRETIONARY TRUST

UNIT TRUST (FIXED)

JOBS

ONLINE SMSF AUDIT

Online Provider for Creating, Storing & Managing Legal Documents

Suite 3.04, Level 3, 29-31 Solent Circuit, Baulkham Hills NSW - 2153

 02 9684 4199  sales@trustdeed.com.au