



Schedule of fees

Superannuation borrowing package ("Limited Recourse Loans")

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▶ Superannuation borrowing package

\$3,850.00 (inclusive of GST)

Advice in relation to the establishment and structure of a borrowing package, including advice in relation to:

- ▶ the structuring of the property contracts – eg who should be the purchaser, what should be done if the custodian has not signed the contract and who should pay the deposit;
- ▶ the structure of the borrowing arrangement;
- ▶ tax and stamp duty related issues such as consequences of the establishment and vesting of the bare trust and GST and income tax return obligations; and
- ▶ advice regarding related party issues and compliance with the superannuation laws.

Preparation of the following documents:

- ▶ deed of acknowledgement and deed of directions (bare trust deeds);
- ▶ minutes of meetings of all relevant parties;
- ▶ product disclosure statement and loan and security documentation for related party lenders (excluding mortgage registration fee);
- ▶ review of and report on the lender's loan documentation for unrelated lenders;
- ▶ compliance letter; and
- ▶ statutory declaration for stamp duty exemption and arranging for the stamping of the deed of acknowledgement (Victoria only).

Does not include:

- ▶ transaction documents for the purchase of the property/asset – eg conveyancing documents;
- ▶ any meetings with us;
- ▶ the incorporation of any companies; or
- ▶ any additional legal advice.

Our superannuation team includes:

ROB JEREMIAH

Principal

03 9611 0103

rjeremiah@harwoodandrews.com.au

Accredited Specialist in Tax Law and Business Law
Director of the Small Independent Superannuation Fund Association (SISFA)
Member of the Superannuation Technical Sub-group of the National Tax Liaison Group

JOANNA MONAHAN

Principal

03 5226 8521

jmonahan@harwoodandrews.com.au

Accredited Specialist in Tax Law

NAOMI PAVLAKIS

Associate

03 9611 0172

npavlakis@harwoodandrews.com.au