



Self-Managed Super Funds Price List

Effective from 1 July 2023 to 30 June 2024

	Excl. GST
Superannuation Roll Over	
SMSF Roll In / Out – SOA Financial Planning	\$1,500
SMSF Roll In / Out – Accounting apart from Year End	\$900
Self-Managed Super Fund (SMSF) Set Up	
SMSF setup SOA – Financial Planning	\$1,800
SMSF with Corporate Trustee - Accounting	\$3,800
SMSF with Individual Trustee - Accounting	\$3,300
Investment Strategy for SMSF	\$1,200
Year End Financial Reports & Tax Return ⁽¹⁾	
Members' Account Balance Under \$1 million	\$2,200
Members' Account Balance Over \$1 million	0.25% of the account balance

⁽¹⁾ SMSF Audit is **NOT** included.