

Q2 2022

Documents & Packages



		Cost	Best Practice	Strategists
Business & Commercial Agreements	Mortgage Deed	\$129	✓	✓
	SMSF Loan Agreement	\$129	✓	✓
	Rental Reduction Agreement	\$129	✓	✓
	Division 7A Loan Agreement	\$129	✓	✓
	Deed of Loan Forgiveness	\$129	✓	✓
	Deed of Gift - Cash, Assets & Unpaid Present Entitlements	\$129	✓	✓
	All Purposes Loan Agreement	\$129	✓	✓
	The Business Protector	\$795	✓	✓
	Services Agreement - General Purposes	\$129	✓	✓
	NDA and Confidentiality Agreement	\$0	✓	✓
	Deed of Assignment of Property	\$129	✓	✓
	Related Party Partnership Agreement	\$129	✓	✓
	Joint Venture Partnership Agreement	\$129	✓	✓
	Business Partnership Agreement	\$129	✓	✓
	Commercial Property Lease	\$129	✓	✓
Farm Lease Agreement	\$229	✓	✓	
Equipment and Motor Vehicle Lease Agreement	\$129	✓	✓	

		Cost	Best Practice	Strategists
Company Establishments	Family Protection Trustee Company	\$641	✓	✓
	SMSF Special Purpose Company	\$641	✓	✓
	Leading Member SMSF Special Purpose Trustee Company	\$641	✓	✓
	Leading Member Discretionary Trustee Company	\$641	✓	✓
	Standard Company - Successor Director option available	\$641	✓	✓

		Cost	Best Practice	Strategists
Company Variation, Upgrades and Admins	Indemnity Deed	\$149	✓	✓
	The Successor Director Solution – Single Company plus upgrade	\$229	✓	✓
	Upgrade to LightYear Docs Standard Company	\$129	✓	✓
	Company Constitution Variation to LightYear Docs SMSF Special Purpose Company	\$129	✓	✓
	Company Constitution Variation to Leading Member Discretionary Trustee Company	\$129	✓	✓
	Company Constitution Variation to Leading Member SMSF	\$129	✓	✓
	Corporate Trustee			

		Cost	Best Practice	Strategists
SMSF Borrowing	LRBA Holding Trust Pack - Non Bank Lending	\$229	✓	✓
	Deed of Promissory Note	\$129	✓	✓
	LRBA Holding Trust Pack - Bank Lending	\$229	✓	✓

		Cost	Best Practice	Strategists
SMSF Establish, Maintain & Upgrade	Superannuation Lump Sum	\$129	✓	✓
	SMSF Wind Up	\$129	✓	✓
	SMSF Establishment	\$129	✓	✓
	SMSF Deed of Variation	\$129	✓	✓
	Member Leaving a SMSF	\$129	✓	✓
	Member Appointment - Standard SMSF (non-leading member)	\$129	✓	✓
	Change of Trustee for SMSFs	\$129	✓	✓
	QROPS SMSF Establishment	\$129	✓	✓
	QROPS SMSF Deed of Variation	\$129	✓	✓
	Member Directed Investment Strategy	\$49	✓	✓
	SMSF Investment Strategy - Fund	\$49	✓	✓
	Contributions To Benefit a Member	\$129	✓	✓
	Contributions Suspense Account	\$129	✓	✓
	Member Appointment – Leading Member SMSF	\$129	✓	✓
	Leading Member SMSF Establishment	\$229	✓	✓
	Leading Member SMSF Deed of Variation	\$229	✓	✓
SMSF Income Streams	TRIS Foldback	\$129	✓	✓
	TRIS Current Year Income Payment	\$49	✓	✓
	Transition to Retirement Income Stream (TRIS)	\$129	✓	✓
	Temporary Incapacity Income Stream	\$129	✓	✓
	Pension Commutation	\$129	✓	✓
	Addition of a Reversionary Pension	\$295	✓	✓
	Account Based Pension Rollback	\$129	✓	✓
	Account Based Pension Current Year Pension Payment	\$49	✓	✓
	Account Based Pension	\$129	✓	✓
Trusts Establishments	Discretionary Trust (Individual and Corporate)	\$129	✓	✓
	SIS Reg 13.22C Related Unit Trust	\$129	✓	✓
	Fixed Unit Trust (Individual and Corporate)	\$129	✓	✓
	Superannuation Unrelated Investment Trust (SUIT)	\$129	✓	✓
	Non Fixed Unit Trust (Individual and Corporate)	\$129	✓	✓
	Leading Member Discretionary Trust (Individual and Corporate)	\$229	✓	✓
	Discretionary Trust (Non-Foreign Person)	\$129	✓	✓
	Leading Member Discretionary Trust (Non-Foreign Person)	\$229	✓	✓
	Family Protection Trust (Individual and Corporate)	\$229	✓	✓

		Cost	Best Practice	Strategists
Trusts Maintenance	Upgrade of Discretionary Trust to a Leading Member Non-Foreign Person Discretionary Trust	\$129	✓	✓
	Upgrade of Discretionary Trust to Leading Member Discretionary Trust	\$129	✓	✓
	Discretionary Trust Distribution Minutes	\$129	✓	✓
	Deed of Succession Appointors	\$129	✓	✓
	Change of Trustee for Discretionary Trusts	\$129	✓	✓
	Changes to Discretionary Trust Positions and Name	\$229	✓	✓
	Declaration of Trust	\$129	✓	✓
	Upgrade of Discretionary Trust to a LightYear Docs Strategic Discretionary Trust	\$129	✓	✓
	Discretionary Trust Vesting	\$129	✓	✓
	Unit Trust Vesting	\$129	✓	✓
	Upgrade of Discretionary Trust to a Non-Foreign Person Discretionary Trust	\$129	✓	✓
	Addition to Designated Beneficiaries	\$129	✓	✓

		Cost	Best Practice	Strategists
Estate Planning	EPOA and Will Automation	\$198		✓
	LYD Will (with Testamentary Trust option)	\$198		✓
	Family Allowance Agreement	\$129		✓
	SMSF Will	\$129		✓
	Dependency Declaration for Superannuation and Income Tax Purposes	\$0		✓
	Buy/Sell Option Agreement	\$229		✓
	Enduring Power of Attorney (NSW)	\$129		✓
	Enduring Power of Attorney (QLD)	\$129		✓
	Enduring Power of Attorney (SA)	\$129		✓
	Enduring Power of Attorney (TAS)	\$129		✓
	Enduring Power of Attorney (VIC)	\$129		✓
	Enduring Power of Attorney (WA)	\$129		✓
	Enduring Power of Attorney (ACT)	\$129		✓
	Enduring Power of Attorney (NT)	\$129		✓
	Advance Care Directive (TAS)	\$129		✓
	Advance Personal Plan (NT)	\$129		✓
	Advance Care Plan (ACT)	\$129		✓
	Advance Care Directive and Enduring Guardian – VIC	\$129		✓
	Advance Care Directive and Enduring Guardian – NSW	\$129		✓
	Advance Care Directive – Western Australia (AHCD WA)	\$129		✓
Advance Care Directive – South Australia (AHCD SA)	\$129		✓	
Advance Care Directive – Queensland (AHCD QLD)	\$129		✓	

		Cost	Best Practice	Strategists
Strategists Only	The Successor Director Solution – Multi Company plus upgrade Constitution	\$229		✓
	The Protector	\$795		✓
	The Moat and Castle	\$550		✓
	Related Party LRBA (Shares) meeting ATO Guidelines	\$450		✓
	Related Party LRBA (Property) meeting ATO Guidelines	\$450		✓
	Leading Member Kit - Upgrade of SMSF Deed and Corporate Trustee to Leading Member control	\$198		✓
	Corporate Trustee & Deed Upgrade to LightYear Docs	\$129		✓

		Cost	Best Practice	Strategists
Leading Member	Upgrade of Discretionary Trust to a Leading Member Non-Foreign Person Discretionary Trust	\$129	✓	✓
	Upgrade of Discretionary Trust to Leading Member Discretionary Trust	\$129	✓	✓
	Member Appointment – Leading Member SMSF	\$129	✓	✓
	Leading Member SMSF Establishment	\$229	✓	✓
	Leading Member SMSF Deed of Variation	\$229	✓	✓
	Leading Member Discretionary Trust (Individual and Corporate)	\$229	✓	✓
	Company Constitution Variation to Leading Member Discretionary Trustee Company	\$129	✓	✓
	Leading Member SMSF Special Purpose Trustee Company	\$641	✓	✓
	Leading Member Discretionary Trustee Company	\$641	✓	✓
	Company Constitution Variation to Leading Member SMSF Corporate Trustee	\$129	✓	✓

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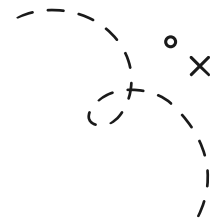
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