

SMSF Trust Deed Updates

Volume Discount Agreement

Parties

DBA Lawyers Pty Ltd ABN 74 120 513 037 of Level 1, 290 Coventry Street, South Melbourne, Victoria ('DBA'); and

Firm Name:		('Firm')
Street Address:		
Postal Address (if different):		
Contact Person:		
Phone:	Fax:	
Email:	Estimated Number of Updates:	
Method of Dispatch (tick one option):	Softcopy (pdf via email)	<input type="checkbox"/>
	Hardcopy	<input type="checkbox"/>

General

The Firm requires DBA to undertake the Estimated Number of Updates and seeks the volume discount subject to the conditions outlined below.

Information for Each Fund:

For each fund, please provide:

- a completed deed update order form;
- the establishment deed together with details of any amendments to it, change of trustee documentation, relevant consents and notices; and
- any other information that the Firm considers relevant.

Copies of deeds rather than originals should be provided.

The Deed Update Package

The deed update package to be provided by DBA comprises:

- a deed of variation (incorporating pro-forma application for membership and notification to contributing employer forms);
- draft trustee and any other relevant resolutions;
- comprehensive product disclosure statement materials for each member (incorporating pro-forma member contribution notice and binding death benefit nomination); and
- detailed instructions, explaining how to execute the documents.

Pricing

Pricing per deed update (including GST) is as follows:

Quantity	Softcopy	Hardcopy
1 to 9	\$500	\$550
10 to 24	\$440	\$490
25 to 49	\$420	\$470
50 to 99	\$400	\$450
100 +	On Application	On Application

Conditions

1. Orders for hardcopy must be received by DBA in batches of 5 or more to qualify for DBA paying the courier cost on dispatch. There is no minimum number for softcopy.
2. If the Estimated Number of Updates is not processed within 6 months (or 12 months for more than 50 updates) of this agreement, DBA may adjust the price of each update to reflect the discount applicable to the actual number processed.
3. The discounted price may not apply to funds with material shortcomings in their document trail. On such a rare occasion, DBA will contact the Firm to discuss the options for handling such an assignment. Also, if any prior deeds or other documents are not provided or are inadequate, a disclaimer may need to be issued.
4. The Firm agrees that DBA will not need to follow-up any of the Firm's clients for payment and will pay DBA within 30 days of supply of each update.
5. As superannuation law is constantly changing DBA notes that the updated deed may soon be rendered out of date in whole or in part. Thus, DBA offers an Annual Update Service to maintain the deed up to date each 1 July with DBA's latest deed and PDS for a small annual cost of \$137.50 (provided payment is made via direct debit). For more information, go to <http://www.dbalawyers.com.au/annual-update-service>
6. This Agreement is governed by the laws of Victoria.

Signed for and on behalf of the Firm: _____

and dated: _____ / _____ /201 _____

Signed for and on behalf of DBA: _____

on the date of this agreement: _____ / _____ /201 _____