

<b>SMSF STAFF DISCOUNT POLICY</b>		<i>Please complete all details in block letters</i>
Firm ordering:		
Person ordering:		
Street address:		
Postal address (if different):		
Phone:	Email:	
Documents will be delivered by email as PDF and 2 x editable word files. An additional fee applies for hardcopy.		

<b>CLASS OF PERSONS* ELIGIBLE FOR DISCOUNT</b>
Please specify the class of persons (ie, employees, directors, partners, office holders or shareholders) SMSFs that will be offered a discount:
<i>*If the above field is left blank the policy will be drafted for all employees including officeholders and shareholders</i>

<b>NAME OF FIRM USING POLICY</b>
Name of Firm:

<b>DISCOUNT TYPE (SELECT ONE)*</b>
<input type="checkbox"/> Percentage Discount <input type="checkbox"/> Dollar Amount <i>*If no selection is made this can be completed by the firm at a later time</i>

<b>SPECIAL INSTRUCTIONS (IF ANY)</b>
Note that DBA is not licensed to provide financial product advice under the <i>Corporations Act 2001</i> (Cth).

<b>NOTES</b>
<ul style="list-style-type: none"> <li>The policy includes a scope of services with a range of inclusions and exclusions that can be tailored by you to suit your specific needs.</li> <li>Our invoice will be made out to the person ordering, unless you instruct us otherwise in the special instructions.</li> <li>For more details, please contact us or visit <a href="http://www.dbalawyers.com.au">www.dbalawyers.com.au</a> and <a href="https://www.dbalawyers.com.au/trustee-education/firms-providing-discounted-smsf-services-to-staff-need-an-appropriate-discount-policy-asap/">https://www.dbalawyers.com.au/trustee-education/firms-providing-discounted-smsf-services-to-staff-need-an-appropriate-discount-policy-asap/</a></li> </ul>