

FOR IMMEDIATE RELEASE
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Launch of Smarter Legal Review Service

Smarter SMSF, an industry award winning and trusted provider of SMSF documents and education, has unveiled its new Smarter Legal Review (SLR) service. This innovative solution is designed to assist advisers in mitigating the legal risks associated with the preparation of various SMSF documents, by obtaining expert legal review before client sign-off utilising our streamlined process. In addition, the SLR service provides support for practitioners who have identified issues or defects in any SMSF documents that require rectification.

“The introduction of Smarter Legal Review aligns with our commitment to providing advisers with the knowledge and tools to empower them to successfully navigate the complexities of SMSFs and the ever-growing importance of SMSF documents” said Aaron Dunn, CEO and co-founder of Smarter SMSF. “We believe this service will significantly enhance our offering to our members and users of our document platform.”

Ensuring greater accuracy and compliance

Through our legal partner, Hill Legal, users have access to Australian Legal Practitioners who will review, prepare and sign-off across a range of SMSF documents to protect you and your clients against any potential risks of incomplete or defective SMSF documents.

The SLR service provides practitioners with a tiered approach to obtaining legal review as part of the SMSF document order, providing flexibility in the level of support to best suits their clients' needs:

- **Scoped Review:** Provides a focused review of SMSF documents at a fixed cost generated through the Smarter SMSF platform, addressing specific queries. This level is ideal for deed variations, changes of trustee, and SMSF deed upgrades., including up to 30 minutes of review time, or alternatively, 30 minutes of legal advice.
- **Comprehensive Review:** Entails a thorough examination of up to three pre-existing SMSF documents at a fixed cost, ensuring prior amendments align with governing documents. This level is beneficial for older SMSFs undergoing upgrades or trustee changes. and includes up to 60 minutes of review time or, alternatively, 60 minutes of legal advice.
- **Simple Rectification:** This service provides a review and rectification of simple and known clerical errors such as incorrect name or description of a party or document, also for a fixed price.
- **Bespoke Review:** Offers a customised solution for complex issues stemming from potentially defective documents at a scoped and quoted cost, including rectification strategies. Examples include lost trust deeds, missing pension documents, or procedural errors in prior trustee changes.

Common documents that may wish to utilise the SLR service include (but not limited to) trust deed updates, missing constitutions, change of trustee, and binding death benefit nominations.

Rectifying SMSF document defects

It is becoming increasingly common to identify defects within an SMSF document chain that require rectification. Whether it be incorrect names, unsigned or undated documents, or procedural issues - all of these defects can present significant problems in the event of dispute. The SLR service can assist practitioners and their clients to rectify the issue by reviewing the SMSF documents and arranging for Hill Legal to prepare a Deed of Rectification.

SMSF Specialist Collaboration

Smarter SMSF has partnered with Hill Legal to facilitate the SLR service. Both businesses are recognised as leaders within the SMSF industry, with Chris Hill, Principal of Hill Legal Lawyers and SMSF specialist advisor playing an ongoing key role in the development and review of the Smarter SMSF documents that are available to order via the platform.

“Hill Legal is excited to partner with Smarter SMSF to add legal support and to better protect the Smarter SMSF community of advisers from the legal risks of defective documents”, said Chris Hill. “Recent case law has shown the need for advisers to obtain judicial advice on the legality and consequences of a defective chain of documents, the cost of which be expensive to advisers and their clients, which can be avoided through a document review and correction process”.

Why the Smarter Legal Review?

- **Risk Mitigation:** Helps advisers minimise the potential for legal disputes arising from document inaccuracies or oversights.
- **Cost-Effectiveness:** Offers fixed-cost pricing across the different levels of legal engagement (subject to the scope of work to be undertaken), ensuring transparency and predictability.
- **Client Reassurance:** Provides clients with the added confidence that their SMSF documents have been thoroughly reviewed by legal specialists.
- **Time Savings:** Streamlines the legal review process, allowing advisers to focus on the strategic opportunities and core services being delivered to their SMSF clients.

The Smarter Legal Review service is now available to utilise via the Smarter SMSF platform.

To find out more about the Smarter Legal Review, see <https://smartersmsf.com/legal-review/>

About Smarter SMSF

Smarter SMSF provides technology-based solutions to educate, automate and simplify the complexities of SMSFs. Smarter SMSF provides accredited CPD education and training, and a comprehensive range of compliant SMSF legal, pension and compliance documents, integrated with SMSF software providers BGL, Class and SuperMate. Smarter SMSF's reliable and scalable automated platform provides professionals with the ability to access these products as a simple and cost-effective subscription to suit the size of your business, or simply pay-as-you-go. Our clients include accounting firms, from mid-tier to local practices, SMSF administrators, auditors, dealer groups, financial advisory firms, and legal firms.

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