

Smarter Legal Review

Smarter documents, with smarter choices

Access to a legal review when ordering SMSF documents, delivered by Hill Legal



	None	Level 1 Scoped review	Level 2 Comprehensive review	Level 3 Bespoke review	Simple rectification
Description	<ul style="list-style-type: none"> You enter the data on the relevant form on the Smarter SMSF platform and submit. The platform will generate a document reflecting that data 	<ul style="list-style-type: none"> A review of documents completed from the Smarter SMSF website, together with pre-existing legal document 	<ul style="list-style-type: none"> A review of a chain of pre-existing SMSF documents with a created Smarter SMSF document to confirm that the Smarter SMSF document is validly created 	<ul style="list-style-type: none"> A review of a SMSF trust deed created from the Smarter SMSF website or elsewhere that have simple clerical errors to be rectified. 	<ul style="list-style-type: none"> A review of an extensive chain of documents that may pre-exist the creation of a Smarter SMSF document and/or the creation of a new legal document to rectify irregularities or defects in pre-existing documents
Scope of service	<ul style="list-style-type: none"> No advice, discussion or legal review has been provided to you about generating the document 	<ul style="list-style-type: none"> Review of <u>one pre-existing</u> document Review and comparison with one created Smarter SMSF document 	<ul style="list-style-type: none"> Review of up to <u>three pre-existing</u> SMSF documents Review and comparison of created smarter SMSF document completed 	<ul style="list-style-type: none"> Review of existing deed with identification of error. Errors identified are simple errors in the draft of the establishing SMSF deed. Preparation of Deed of Rectification to correct the clerical error, dispatched in PDF format for signing by the adviser or client. The rectifying deed relates to the error in one trust deed only 	<ul style="list-style-type: none"> Review of existing documents, facts and circumstances provided. Scope of work determined after completion of review
Examples		<ul style="list-style-type: none"> SMSF deed upgrade Change of trustee Form of binding death benefit nomination compared to form required by current Smarter SMSF Deed 	<ul style="list-style-type: none"> SMSF deed upgrade Change of trustee Form of binding death benefit nomination compared to form required by current Smarter SMSF Deed 	<ul style="list-style-type: none"> Incorrect date of deed or incorrect execution date. Incorrect name of fund. Incorrect name or description of a party such as trustee or member. Incorrect reference to a prior amending deed or deed of variation. 	<ul style="list-style-type: none"> Defects in pre-existing deeds of variation upgrading funds deed Defects in deeds appointing or effecting a change of trustee Lost trust deeds Creation of a deed of rectification or deed of adoption of a new trust deed

	None	Level 1 Scoped review	Level 2 Comprehensive review	Level 3 Bespoke review	Simple rectification
Prerequisites	•	<ul style="list-style-type: none"> • Provision of one executed pre-existing document, or • Questions for advice, clearly identified with relevant client facts or circumstances 	<ul style="list-style-type: none"> • Provision of no more than three executed pre-existing documents, or • Questions for advice, clearly identified with relevant client facts or circumstances 	<ul style="list-style-type: none"> • Provision of defective trust deed. • Identification of defect to be rectified. • One defective trust deed only to be rectified 	<ul style="list-style-type: none"> • N/A
Cost	N/A	\$300 (+ GST)	\$600 (+ GST)	\$400 (+ GST)	Fee quoted following review ^
Time frame (working days)		1 - 3	2 - 5	2 - 5	5 - 10
Exclusions	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • Review of additional or composite documents beyond scope • No advice or review of post execution documents 	<ul style="list-style-type: none"> • Review of additional or composite documents beyond scope • No advice or review of post execution documents 	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • Identified and confirmed following fee quote

^ If a Bespoke review is recommended following either a Scoped review or a Comprehensive review, the fee quote will deduct the price paid for those reviews.

Disclaimer:

You acknowledge and agree that Smarter SMSF provides a referral service and does not provide legal advice. It is not legally responsible, nor does it accept liability for any legal advice provided or communicated to you from Hill Legal through the Smarter SMSF platform. You acknowledge and agree that the accuracy of the advice provided by Hill Legal is dependent upon the accuracy and completeness of the documents and information you submit to Hill Legal via the smart SMSF platform and neither Hill Legal nor Smarter SMSF will be liable in tort or in contract or otherwise at law for any inaccurate, incomplete, or false information provided upon which legal advice is provided. Neither Hill legal nor Smarter SMSF will be responsible to you or your client in choosing a particular legal review service. Nor will Hill legal be responsible for the consequences of you or your client failing to adopt a particular course of action, or recommendation including where a bespoke or comprehensive review is recommended that is not taken up or adopted by you or your client. In selecting either of the review services identified above you acknowledge that you are engaging Hill Legal as principal and not as agent for your client, regardless of whether your client will be a party to any document that is prepared or in respect of any service or advice provided to you for or on behalf of your client.