

Family Trust Setup Costs

| | Family Trust Setup (individual trustees) \$660 | Company Setup (company as trustee) \$1,320 |
|--|---|---|
| Family Trust Deed | ✓ | ✓ |
| ASIC documents for setup/windup | N/A | ✓ |
| Trust Minutes and Resolutions on setup | ✓ | ✓ |
| ATO Tax file number application | ✓ | N/A |

Individual and Family Trust Annual Tax Costs

| | Basic Tax Return \$180 | Complex Tax Return From \$240 | Family Trust Tax return and financial statements From \$660 | Family Trust Tax return and Financial Statements (company trustee) From \$770 |
|--|-----------------------------------|--|--|--|
| Tax Return preparation and lodgement | ✓ | ✓ | ✓ | ✓ |
| Checking of Notice of Assessment | ✓ | ✓ | N/A | N/A |
| ATO Payment arrangements | \$110 for simple | From \$220 for complex | N/A | N/A |
| Instalment Activity statement variations | \$110 | \$110 | N/A | N/A |
| ASIC company secretarial | N/A | N/A | N/A | ✓ |
| Annual Trust Income Resolution | N/A | N/A | ✓ | ✓ |