

# H&R Block SMSF Solutions Pricing Guide

## Establishment Costs

SMSF establishment with individual trustees \$ 750

SMSF establishment with corporate trustee \$ 1,690

\*Includes ASIC company registration fee

## SMSF Borrowing

Bank Lender Bare Trust Package \$ 1,690

Related Party Bare Trust Package \$ 2,840

Includes corporate trustee and ASIC company registration fee

## Other Services

ASIC Agent for Corporate Trustee  
-per annum \$ 220

Pension Establishment -per member \$ 500

Pension Establishment -for 2 members \$ 900

Lump Sum Withdrawal -per withdrawal \$ 110

Trust Deed Upgrade  
-Initial \$ 450  
-Subsequent \$ 330

Deed Replacement \$ 660

Change of Trustee \$ 550

Corporate Trustee Establishment to  
replace Individual Trustee \$ 940\*

\*Includes corporate trustee and ASIC company registration fee

Specialist one-off advise - hourly rate (min. 1 hr) \$ 330

## Annual Fees

Financial Statements and Tax Return \$ 1,950

Independent Audit \$ 500

**Total \$ 2,450**

- Receive \$100 discount on fees if paid via monthly direct debit in the year for which the financial statements are to be prepared.
- If not paid via monthly direct debit, 50% of total fee to be paid to commence the work, the balance owing on lodgement of the tax return.
- NO restriction on the number and type of investments. You are free to use any financial institution and broking platforms.

## Additional Annual Fees

Where the following elements are applicable to the fund, there is an additional annual fee:

GST Registered Fund \$ 250

Segregated Fund \$ 550

Cryptocurrency By Quote

Overseas Property \$ 550

Actuarial Certificate -Account Based Pension \$ 250  
-Defined Benefit Pension \$ 600

Audit Contravention Report \$ 250

**Any questions or to obtain an application form**

**Email:** [smsf@hrblock.com.au](mailto:smsf@hrblock.com.au)

**Phone:** 1300 611 320



All prices are GST inclusive

Fees are current as at April 2026 and can be subject to change.