

TRUSTS

- Leading Member Discretionary Trust – Individual Trustee
- Leading Member Discretionary Trust – Corporate Trustee
- Standard Discretionary Trust – Individual Trustee
- Standard Discretionary Trust – Corporate Trustee
- Change of Trustee for Discretionary Trusts
- Addition to Designated Beneficiaries
- Superannuation Unrelated Investment Trust (SUIT)
- SIS Reg 13.22C Related Unit Trust
- Standard (non-fixed) Unit Trust
- Leading Member Non-Foreign Person Discretionary Trust
- Declaration of Trust
- Leading Member Discretionary Trust Variation
- Deed of Succession Appointors
- Discretionary Trust Vesting
- Discretionary Trust Distribution Minutes
- Fixed Unit Trust
- Family Protection Trust (FPT)
- Changes to Discretionary Trust Positions and Name
- Upgrade of Discretionary Trust to a Non-Foreign Person Discretionary Trust
- Upgrade of Discretionary Trust to a LightYear Docs Strategic Discretionary Trust
- Unit Trust Vesting
- Non-Foreign Person Discretionary Trust

SMSF ESTABLISH, MAINTAIN & UPGRADE

- SMSF Establishment – Individual Trustee
- SMSF Establishment – Corporate Trustee
- Leading Member SMSF Establishment – Individual Trustee – LIGHTYEAR DOCS EXCLUSIVE
- Leading Member SMSF Establishment – Corporate Trustee – LIGHTYEAR DOCS EXCLUSIVE
- Leading Member SMSF Deed of Variation – LIGHTYEAR DOCS EXCLUSIVE
- SMSF Deed of Variation
- Change of Trustee for SMSFs
- Dependency Declaration for Superannuation & Income Tax Purposes
- Contributions Suspense Account
- SMSF Investment Strategy – Fund
- Contributions To Benefit a Member
- Member Appointment – Leading Member SMSF
- Member Appointment - Standard SMSF (non-leading member)
- SMSF Wind Up
- Member Directed Investment Strategy
- QROPS SMSF Deed of Variation
- QROPS SMSF Establishment – Individual Trustee
- QROPS SMSF Establishment – Corporate Trustee
- Member Leaving a SMSF
- Superannuation Lump Sum

SMSF BORROWING

- AllLRBA Holding Trust Pack (Non-Bank) – including minutes
- LRBA Holding Trust Pack (Bank) – including minutes
- Deed of Promissory Note



BUSINESS AND COMMERCIAL AGREEMENTS

- All Purposes Loan Agreement
- General Purpose Services Agreement
- NDA and Confidentiality Agreement
- Business Partnership Agreement
- Division 7A Loan Agreement
- Mortgage Deed
- Personal Guarantee
- Deed of Gift - Cash, Assets & Unpaid Present Entitlements
- SMSF Loan Agreement
- Commercial Property Lease
- Buy/Sell Option Agreement
- Rental Reduction Agreement
- Deed of Loan Forgiveness
- Equipment and Motor Vehicle Lease Agreement
- Annuity Contract
- Farm Lease Agreement
- Simple Partnership Agreement
- Deed of Assignment of Property
- The Business Protector
- Joint Venture Partnership Agreement
- Related Party Partnership Agreement

SMSF - INCOME STREAMS

- Account Based Pension
- Transition to Retirement Income Stream (TRIS)
- Account Based Pension Rollback
- Account Based Pension Current Year Pension Payment
- TRIS Current Year Pension Payment
- TRIS Foldback
- Pension Commutation
- Temporary Incapacity Income Streams
- Addition of a Reversionary Pension

COMPANIES

- Standard Company - including Classes of Shares
- SMSF Special Purpose Corporate Trustee
- Leading Member SMSF Special Purpose Corporate Trustee
- Leading Member Discretionary Trustee Company
- Company Constitution Variation to Leading Member SMSF Corporate Trustee
- Company Constitution Variation to LightYear Docs SMSF Special Purpose Company
- Company Constitution Variation to Leading Member Discretionary Trustee Company
- Upgrade to LightYear Docs Standard Company
- The Successor Director Solution – Single Company plus upgrade

