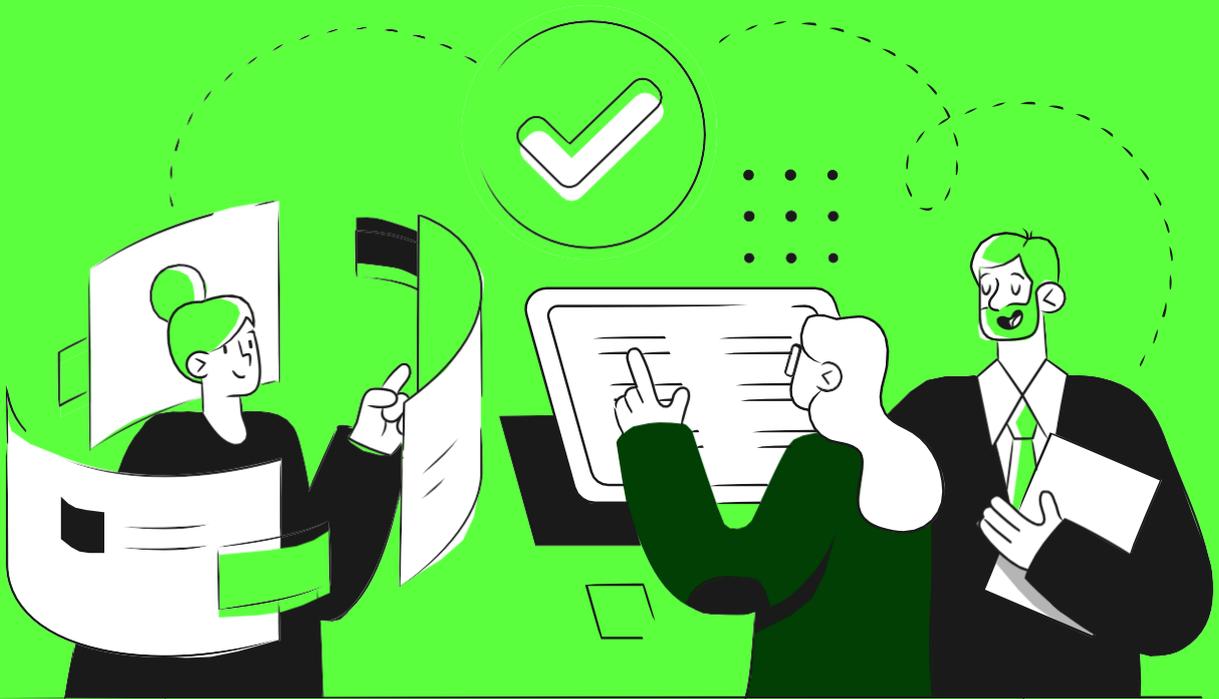


Q3 2022

Documents & Packages



		Best Practice	Strategists
Business & Commercial Agreements	Mortgage Deed	✓	✓
	SMSF Loan Agreement	✓	✓
	Rental Reduction Agreement	✓	✓
	Division 7A Loan Agreement	✓	✓
	Deed of Loan Forgiveness	✓	✓
	Deed of Gift - Cash, Assets & Unpaid Present Entitlements	✓	✓
	All Purposes Loan Agreement	✓	✓
	The Business Protector	✓	✓
	Services Agreement - General Purposes	✓	✓
	NDA and Confidentiality Agreement	✓	✓
	Deed of Assignment of Property	✓	✓
	Related Party Partnership Agreement	✓	✓
	Joint Venture Partnership Agreement	✓	✓
	Business Partnership Agreement	✓	✓
	Commercial Property Lease	✓	✓
	Farm Lease Agreement	✓	✓
Equipment and Motor Vehicle Lease Agreement	✓	✓	
Shareholder Agreement	✓	✓	

		Best Practice	Strategists
Company Establishments	Family Protection Trustee Company	✓	✓
	SMSF Special Purpose Company	✓	✓
	Leading Member SMSF Special Purpose Trustee Company	✓	✓
	Leading Member Discretionary Trustee Company	✓	✓
	Standard Company - Successor Director option available	✓	✓

		Best Practice	Strategists
Company Variation, Upgrades and Admins	Indemnity Deed	✓	✓
	The Successor Director Solution – Single Company plus upgrade	✓	✓
	Upgrade to LightYear Docs Standard Company	✓	✓
	Company Constitution Variation to LightYear Docs SMSF Special Purpose Company	✓	✓
	Company Constitution Variation to Leading Member Discretionary Trustee Company	✓	✓
	Company Constitution Variation to Leading Member SMSF	✓	✓
	Corporate Trustee		

		Best Practice	Strategists
SMSF Borrowing	LRBA Holding Trust Pack - Non Bank Lending	✓	✓
	Deed of Promissory Note	✓	✓
	LRBA Holding Trust Pack - Bank Lending	✓	✓

	Best Practice	Strategists
SMSF Establish, Maintain & Upgrade	Superannuation Lump Sum	✔
	SMSF Wind Up	✔
	SMSF Establishment	✔
	SMSF Deed of Variation	✔
	Member Leaving a SMSF	✔
	Member Appointment - Standard SMSF (non-leading member)	✔
	Change of Trustee for SMSFs	✔
	QROPS SMSF Establishment	✔
	QROPS SMSF Deed of Variation	✔
	Member Directed Investment Strategy	✔
	SMSF Investment Strategy - Fund	✔
	Contributions To Benefit a Member	✔
	Contributions Suspense Account	✔
	Member Appointment – Leading Member SMSF	✔
	Leading Member SMSF Establishment	✔
Leading Member SMSF Deed of Variation	✔	

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

	Best Practice	Strategists
Trusts Establishments	Discretionary Trust (Individual and Corporate)	✔
	SIS Reg 13.22C Related Unit Trust	✔
	Fixed Unit Trust (Individual and Corporate)	✔
	Superannuation Unrelated Investment Trust (SUIT)	✔
	Non Fixed Unit Trust (Individual and Corporate)	✔
	Leading Member Discretionary Trust (Individual and Corporate)	✔
	Discretionary Trust (Non-Foreign Person)	✔
	Leading Member Discretionary Trust (Non-Foreign Person)	✔
	Family Protection Trust (Individual and Corporate)	✔
	Crypto Discretionary Trust	✔

	Best Practice	Strategists	
Trusts Maintenance	Upgrade of Discretionary Trust to a Leading Member Non-Foreign Person Discretionary Trust	✓	✓
	Upgrade of Discretionary Trust to Leading Member Discretionary Trust	✓	✓
	Discretionary Trust Distribution Minutes	✓	✓
	Deed of Succession Appointors	✓	✓
	Change of Trustee for Discretionary Trusts	✓	✓
	Changes to Discretionary Trust Positions and Name	✓	✓
	Declaration of Trust	✓	✓
	Upgrade of Discretionary Trust to a LightYear Docs Strategic Discretionary Trust	✓	✓
	Discretionary Trust Vesting	✓	✓
	Unit Trust Vesting	✓	✓
	Upgrade of Discretionary Trust to a Non-Foreign Person Discretionary Trust	✓	✓
	Addition to Designated Beneficiaries	✓	✓

	Best Practice	Strategists	
Estate Planning	EPOA and Will Automation		✓
	LYD Will (with Testamentary Trust option)		✓
	Family Allowance Agreement		✓
	SMSF Will		✓
	Dependancy Declaration for Superannuation and Income Tax Purposes		✓
	Buy/Sell Option Agreement		✓
	Enduring Power of Attorney (NSW)		✓
	Enduring Power of Attorney (QLD)		✓
	Enduring Power of Attorney (SA)		✓
	Enduring Power of Attorney (TAS)		✓
	Enduring Power of Attorney (VIC)		✓
	Enduring Power of Attorney (WA)		✓
	Enduring Power of Attorney (ACT)		✓
	Enduring Power of Attorney (NT)		✓
	Advance Care Directive (TAS)		✓
	Advance Personal Plan (NT)		✓
	Advance Care Plan (ACT)		✓
	Advance Care Directive and Enduring Guardian – VIC		✓
	Advance Care Directive and Enduring Guardian – NSW		✓
	Advance Care Directive – Western Australia (AHCD WA)		✓
Advance Care Directive – South Australia (AHCD SA)		✓	
Advance Care Directive – Queensland (AHCD QLD)		✓	

	Best Practice	Strategists
Strategists Only	The Successor Director Solution – Multi Company plus upgrade Constitution	✓
	The Protector	✓
	The Moat and Castle	✓
	Related Party LRBA (Shares) meeting ATO Guidelines	✓
	Related Party LRBA (Property) meeting ATO Guidelines	✓
	Leading Member Kit - Upgrade of SMSF Deed and Corporate Trustee to Leading Member control	✓
	Corporate Trustee & Deed Upgrade to LightYear Docs	✓

	Best Practice	Strategists
Leading Member	Upgrade of Discretionary Trust to a Leading Member Non-Foreign Person Discretionary Trust	✓
	Upgrade of Discretionary Trust to Leading Member Discretionary Trust	✓
	Member Appointment – Leading Member SMSF	✓
	Leading Member SMSF Establishment	✓
	Leading Member SMSF Deed of Variation	✓
	Leading Member Discretionary Trust (Individual and Corporate)	✓
	Company Constitution Variation to Leading Member Discretionary Trustee Company	✓
	Leading Member SMSF Special Purpose Trustee Company	✓
	Leading Member Discretionary Trustee Company	✓
	Company Constitution Variation to Leading Member SMSF	✓
	Corporate Trustee	✓

	Best Practice	Strategists
	✓	✓
Basic Employment Agreement	✓	✓
Employee Cover Letter	✓	✓
Employee Agreement for Apprentice or Trainee	✓	✓
Employee Agreement for Professional Employee	✓	✓
Executive Employment Agreement	✓	✓
Part Time Employment Agreement (Short Form)	✓	✓
Casual Employment Agreement	✓	✓
Basic Employment Agreement (Long Form)	✓	✓
Superannuation Fund Letter	✓	✓
Contractor Confidentiality Agreement	✓	✓
Employee Confidentiality Agreement (Long Form)	✓	✓
Employee Confidentiality Agreement	✓	✓
Part Time Work Agreement	✓	✓
Cover Letter to Amend Employment Agreement	✓	✓
Contractor’s Agreement – Individual Contractor (Long Form)	✓	✓

Human Resource Documents

Contractor’s Agreement – Company Contractor (Long Form)	✔	✔
Recruitment Services Agreement	✔	✔
Casual Conversion Letter	✔	✔
Formal Warning Letter	✔	✔
Final Warning Letter	✔	✔
Letter of Termination with Notice	✔	✔
Letter of Termination – for Misconduct, without Notice	✔	✔
Annual Leave Clause	✔	✔
Performance Based Bonus	✔	✔
Commission Based on Actual Revenue	✔	✔
Commission Based on Actual Sales	✔	✔
Community Service Leave	✔	✔
Compassionate Leave	✔	✔
Professional Membership Fees	✔	✔
Flexible Working Arrangements	✔	✔
Fringe Benefits Tax	✔	✔
Policies and Procedures	✔	✔
Incorporating Provisions of Industrial Instruments	✔	✔
Jurt Service Leave	✔	✔
Leave Without Pay	✔	✔
Loyalty and Duties	✔	✔
Motor Vehicles Use of Employers Vehicle	✔	✔
Motor Vehicle Fuel Card and Employees Vehicle	✔	✔
Refund for use of Employees Vehicle	✔	✔
Non-Compete	✔	✔
Non-Solicitation Clause	✔	✔
Parental Leave	✔	✔
Personal and/or Careers Leave	✔	✔
Pre-Employment Medical Checks	✔	✔
Reimbursement of Reasonable Travel Expenses	✔	✔
Salary Sacrifice	✔	✔
Specified Travel Expenses	✔	✔
Summary Dismissal	✔	✔
Gardening Leave	✔	✔
Termination of Executive	✔	✔
Unpaid Study Leave	✔	✔
Working Hours	✔	✔
Employee Requests for Flexible Working Arrangements	✔	✔
Employer Responding to a Request for Flexible Workhours	✔	✔
Flexible Working Arrangements (Long Form)	✔	✔
Letter of Successful Completion of Probation Period	✔	✔
Bonus Performance Based	✔	✔
Fringe Benefits Tax (Long Form)	✔	✔
Pay Slip Template	✔	✔
Disclosure of Intellectual Contract	✔	✔
Drug and Alcohol Policy	✔	✔
Workplace Surveillance Policy	✔	✔
Employee Standard of Conduct Guidelines	✔	✔
Victimisation Policy	✔	✔

Grievance Policy	✓	✓
Harassment and Bullying Policy	✓	✓
No Smoking Policy	✓	✓
Social Media Policy	✓	✓
Anti-Discrimination Policy	✓	✓
Termination of Employment Policy	✓	✓
Conflict of Interest Policy	✓	✓
Redundancy Policy	✓	✓
Absenteeism Policy	✓	✓
Confidentiality Policy	✓	✓
Performance Management Policy	✓	✓
Mental Health and Wellbeing Policy	✓	✓
Personal Leave Policy	✓	✓
Acceptable IT Use Policy	✓	✓
Long Service Leave Policy	✓	✓

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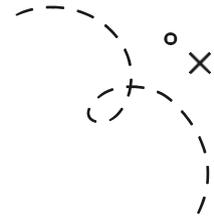
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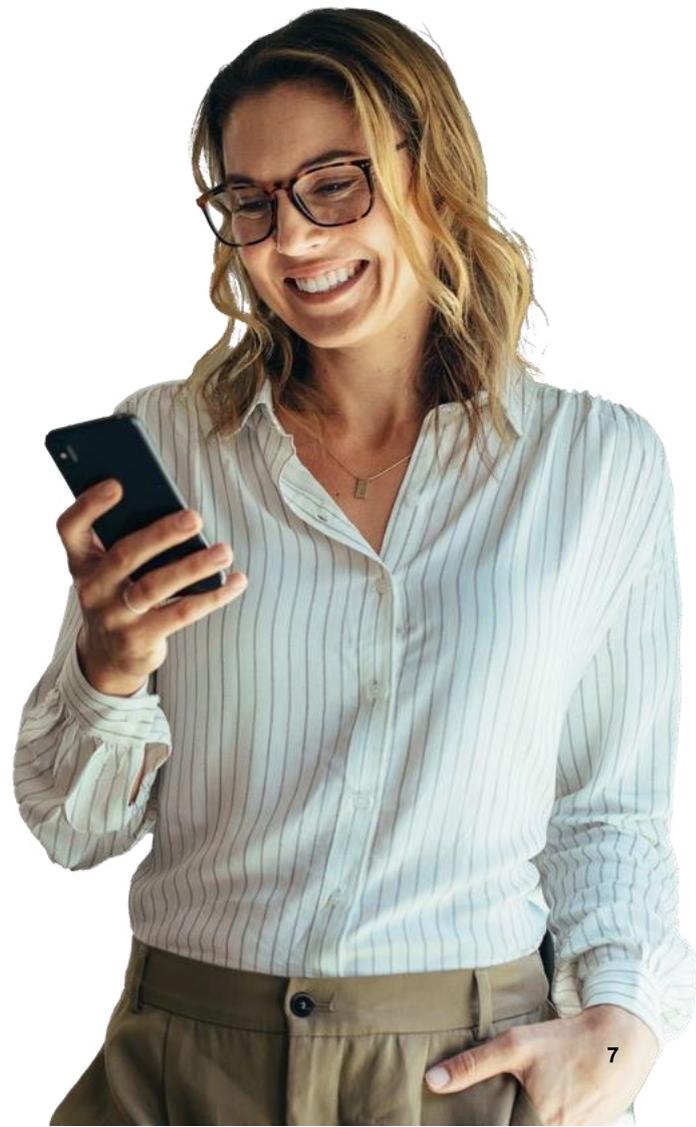
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