

## *Prudentia Law Trust Maintenance*

### *Bronze Class \$600 per year / \$50 per month (including GST)*

- Gifting Maintenance
- Annual updating regarding capital contributions/reductions
- Annual trustee maintenance
- Unlimited trustee resolutions for activity on trust

### *Silver Class \$900 per year / \$75 per month (including GST)*

- Gifting Maintenance
- Annual updating regarding capital contributions/reductions
- Annual trustee maintenance
- Unlimited trustee resolutions for activity on trust
- Unlimited phone calls to Prudentia Law for general legal questions and basic assistance – i.e. general calls of up to 10 minutes a time (normally \$135, \$185 or \$350 + GST per hour)
- Annual Review of personal tax position and debt structure to ensure tax efficiencies are being obtained
- Annual Review and sign off of accounts for trust – if prepared by your accountant
- Unlimited trustee signing of ongoing trust bank account documents and other signing requirements (excluding refinances, etc)

### *Gold Class \$1,380 per year / \$115 per month (including GST)*

- Gifting Maintenance
- Annual updating regarding capital contributions/reductions
- Annual trustee maintenance
- Unlimited trustee resolutions for activity on trust
- Unlimited phone calls to Prudentia Law for general legal questions and basic assistance – i.e. general calls of up to 10 minutes a time (normally \$135, \$185 or \$350 + GST per hour)
- Annual Review of personal tax position and debt structure to ensure tax efficiencies are being obtained
- Unlimited trustee signing of ongoing trust bank account documents and other signing requirements (excluding refinances, etc)
- Organising preparation of financial accounts for basic trust activities (assuming trust is used for ownership of personal residence and gifting purposes only)

Minimum period is for 12 months.

All subsequent periods are for a minimum of 12 months.

Each payment is due on the 1<sup>st</sup> day of each month.

Authority will apply indefinitely until advised otherwise.

Cancellation to be advised one month prior to your anniversary.