

TAX FEE SCHEDULE

Authorised for distribution by Equity Trustees Limited and Equity Trustees Wealth Services Limited

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INDIVIDUAL TAXATION

ACTIVITY	RATE
Preparation activities	\$264 per hour
Minimum fee	\$264
Taxation Manager consulting fee	\$396 per hour

The minimum fee stated represents a time/cost threshold for the given task. Any additional time required will be charged at the stated hourly rate.

Preparation activities include:

- Income tax return preparation and lodgement
- Business and instalment activity statement registration, preparation and lodgement
- Capital gains reconstructions
- Individual tax file number applications
- General reporting and correspondence relating to taxation affairs



DECEASED INDIVIDUAL, DECEASED ESTATE AND TRUST TAXATION

ACTIVITY	RATE
Preparation activities	\$264 per hour
Minimum fee (deceased individual)	\$660
Minimum fee (deceased estate and trust)	\$792
Annual fee for income tax return not necessary form	\$132
Annual fee for tax return with under \$2,000 income	\$264
Deceased estate tax file number application	\$132
Taxation Manager consulting fee	\$396 per hour

The minimum fee stated represents a time/cost threshold for the given task. Any additional time required will be charged at the stated hourly rate.

Preparation activities include:

- Income tax return preparation and lodgement
- Business and instalment activity statement registration, preparation and lodgement
- Issuing beneficiary statements of taxable income
- General reporting and correspondence relating to taxation affairs



CHARITABLE TRUST TAXATION (WHERE EQUITY TRUSTEES IS APPOINTED TRUSTEE)

ACTIVITY	RATE
Refund of franking credit application preparation and lodgement (per account)	
Refund \$0 - \$150	\$nil
Refund \$151 - \$500	\$132
Refund \$501 - \$50,000	\$264
Refund \$50,001 - \$100,000	\$528
Refund greater than \$100,000	\$792
Annual GST return preparation and lodgement (per account)	
Refund \$0 - \$70	\$nil
Refund \$71 - \$150	\$66
Refund \$151 - \$500	\$132
Refund \$501 - \$1,000	\$264
Refund greater than \$1,000	\$528
Charitable trust ABN, TFN application and GST registration	\$396
Preparation activities	\$264 per hour
Taxation Manager consulting fee	\$396 per hour

Preparation activities include:

- Franking credit and GST compliance where EQT/ETWSL is not appointed as trustee
- Quarterly business and instalment activity statement preparation and lodgement
- Activities required to satisfy audit requests made by ATO
- General reporting and correspondence relating to taxation affairs

All fees are inclusive of GST.

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