

PRICE LIST

Prices effective from 1 July 2021

New structures and associated agreements	From
Business plans	Hourly rate
By laws	Hourly rate
Charitable trusts	880.00
Constitutions	Hourly rate
Deeds	Hourly rate
Dividend distribution policies	330.00
Joint venture agreements	1,320.00
Memorandum of understanding/heads of agreement	1,320.00
Partnership deeds – general	660.00
Partnership deeds – limited liability	1,320.00
Partnership deeds of trusts	660.00
Partnership management agreements	660.00
Partnership dissolution	330.00
Rules – for association	Hourly rate
Shareholder agreements	Hourly rate
Special disability trusts	660.00
Special trust deeds (non-discretionary, for minors, etc)	1,320.00
Unitholder agreements	Hourly rate
Unit trusts for managed investment scheme	2,200.00

General agreements, contracts and deeds	From
Agency agreements	660.00
Assignment of loan or intellectual property	660.00
Assignment of charge	660.00
Buy/sell agreements – business or securities	1,100.00
Commercial lease of property (Victoria only)	880.00
Confidentiality agreements	440.00
Consultancy agreements	990.00
Deeds of forgiveness	330.00
Deeds of gift	330.00
Deeds of rescission	330.00
Deeds of release	330.00
Deeds of subordination	440.00
Deeds of undertaking	440.00
Deeds of withdrawal	440.00
Employment contracts – single	550.00
Guarantee and indemnity	440.00
Licence agreements – business or intellectual property	550.00
Powers of attorney	440.00
Service agreements	330.00
Termination agreements	440.00
Subscription agreements	550.00
Warranties	440.00

General conditions

All fees listed in this price list are for a standard product.

If significant re-drafting is required, we will provide you with a written quote.

All fees shown throughout this price list are inclusive of GST and do not include stamp duty or disbursements.

Payment options

- Cheque with order form: Please make cheque payable to: Castle Legal Pty Ltd
- Credit card: Please complete Credit Card Authorisation form and return with order
- Credit terms of 30 days: Approved clients only

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ASIC applications		From
Audit relief		275.00

Convertible notes		From
Advice and implementation		770.00
Issue of convertible notes		330.00

Conveyancing services		From
Transfer of title on change of trustee	For first property ^{Note 1, 2, 3}	660.00
	For each additional property ^{Note 1, 2, 3}	330.00
Transfer of title when bare trust winds up	For first title ^{Note 1}	660.00
	For each additional title ^{Note 1}	143.00
Registration of real property mortgages ^{Note 1, 3}		220.00
Discharge of mortgage ^{Note 1, 3}		220.00

Note 1 Disbursement payable to Land Victoria is additional

Note 2 Disbursement payable to PEXA is additional

Note 3 Searches (if applicable) are additional

Estate planning		From
Wills		660.00 – 1,000.00
Testamentary trusts		990.00 – 4,400.00
Powers of Attorney – any type		440.00

Financing, loans and securities		From
Commercial loan agreements		770.00
Division 7A loan agreements		132.00
Limited recourse loan agreement		880.00
Loans for unpaid present entitlement		660.00
Loan modification deeds (to comply with PCG 2016/5)		770.00
Sub-trust (loan for unpaid present entitlement) loan agreements		770.00
Vendor finance		880.00
Finance lease agreements		880.00
Hire purchase agreements		880.00
Deeds of subordination		440.00
General security agreements		880.00
Mortgages over real property (land) – form only		220.00
Mortgages over real property (land) – form and documentation		880.00
PPSR registration ^{Note 1}		110.00
Lodgement of docs with Land Victoria		66.00
Loan agreement, general security agreement and PPSR registration (usually \$1,650.00)		990.00

Note 1 Disbursement payable to the PPSR is additional

Not for profit services		From
Drafting of constitution		Hourly rate
Drafting of rules		Hourly rate
ABN applications		231.00
ACNC charity applications		330.00
Deductible gift recipient applications – if merely an adjunct to the ACNC application		132.00
Deductible gift recipient applications – for cultural organisations, environmental organisations, harm prevention charities and overseas aid funds		550.00

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Option Plans	From
Advice and implementation	770.00
Issue of options	Hourly rate

Superannuation Services

Changes to existing superannuation funds	From
Admission of a member – one member	77.00
– subsequent members (each)	11.00
Change of fund name	286.00
Change of trustee	319.00
Change of trustee and deed update	528.00
Conveyancing on change of trustee (see page 2) ^{Note 1,2}	
Deed updates ^{Note 3}	297.00
Lodgement of stamped transfer at Land Victoria (see page 2) ^{Note 1,2}	
Vesting (winding up) of a superannuation fund	275.00
Withdrawal of a member - one member	44.00
- subsequent members (each)	11.00

Note 1 Disbursement payable to Land Victoria is additional

Note 2 Disbursement payable to PEXA

Note 3 Bulk rates available

Borrowing arrangements	From
Establishment of bare trust (stand alone) Includes bare trust deed, minutes for SMSF, minutes for custodian statutory declaration (for stamp duty purposes) and stamping of bare trust deed ^{Note 1}	990.00
Limited recourse loan agreement (stand alone, compliant with PCG 2016/5)	880.00
Loan modification deeds (to comply with PCG 2016/5)	660.00
Mortgage over property (see page 2) ^{Note 2,3}	880.00
Package of bare trust establishment, loan agreement and mortgage ^{Note 2}	1,540.00
Transfer of title when bare trust winds up ^{Note 2,3}	660.00
Reprint of bare trust deed for subsequent property acquisitions	330.00
Lodge bare trust with State Revenue Office ^{Note 1}	220.00

Note 1 Disbursement possibly payable to State Revenue Office

Note 2 Disbursement payable to Land Victoria is additional

Note 3 Disbursement payable to PEXA

Product disclosure statements	From
Short – for Castle deeds only	110.00
Long – for Castle deeds only	220.00

Pension kits	From
Account based pensions	660.00
Transition to retirement income streams	660.00

Trust arrangements	From
Declaration of Trust	110.00
Acknowledgement of Trust	110.00

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Trust Services

Borrowing arrangements		From
Change of appointor and/or guardian		319.00
Change to beneficiaries (in discretionary trust)		330.00
Change of trust name		286.00
Change of trustee		319.00
Change of vesting date		319.00
Conferral of additional powers on trustee		319.00
Deed review with written report		550.00
Variation of deed to define income and permit income streaming		880.00
Variation of deed to define income, permit income streaming and introduce an appointor succession plan		1,100.00
Variation of deed to exclude foreign beneficiaries	from Castle deeds	330.00
	from other suppliers	550.00

Other services		From
Appointment of custodian trustee		220.00
Declaration of trust (basic)		220.00
Deed of forgiveness		330.00
Deed of gift		330.00
Deed of ratification		330.00
Deed of confirmation		330.00
Deed of rectification		330.00
Deed of relinquishment		330.00
Deed of renunciation		330.00
Distribution minutes		110.00

Winding up of trusts		From
Vesting (winding up) of a bare trust		231.00
Vesting (winding up) of a discretionary trust	for Castle deeds	165.00
	for other suppliers	264.00
Vesting (winding up) of a unit trust		286.00

Hourly rates		
Name	Role	Rate
Tony Rabar	Principal	\$550.00
Jennifer Hamley	Consultant	\$385.00
Paul Davidson	Lawyer	\$330.00
David Hamley	Senior Paralegal	\$275.00
Jayne Shaw-Smith	Paralegal	\$220.00