



Client Legal Review

	Category 1 Data Confirmation	Category 2 Scope Review	Category 3 Comprehensive Review
Description	When your data entered is to be reviewed by the legal services provider.	When the document produced is to be reviewed in light of particular concern(s) identified by you.	When the entire situation of your client needs to be considered.
Cost (excl. GST)	\$125	\$295	\$600
Working Days	1-2	2-3	3-5
Example 1		Amendment to the beneficiaries described in the discretionary trust before the trust deed is signed.	Change of Trustee where one of the necessary parties to the documents is deceased or deregistered and legal advice is necessary or recommended.
Example 2	Establishment of Discretionary Trust to pick up legal issues e.g. with the Settlor being a beneficiary apparent from the information entered.	SMSF Deed of Variation that requires amendments to the NowInfinity documents to provide for a third party to consent to the amendments (i.e. not the trustee or member) as required by the latest Governing Rules of the Fund.	SMSF Deed of Variation where there are numerous prior Deeds of Variation that have been uploaded by you.

For more details on the process and access to NowInfinity's legal services provider, see [CLIENT LEGAL REVIEW FACT SHEET](#).

Important Disclaimer

The three categories of legal review as set out in the CLIENT LEGAL REVIEW FACT SHEET above will be provided by the third party legal service provider, mostly likely to be DGF Morgan & Associates Pty Ltd ACN 164 257 363 and your receipt of such CLIENT LEGAL REVIEW legal advice is subject to its terms and conditions available at <https://www.nowinfinity.com.au/legal-terms-and-conditions>. Where third party CLIENT LEGAL REVIEW legal advice is to be provided by another third party legal service provider, that legal service provider's terms and conditions will apply and that legal service provider will be responsible for providing you with a copy of them at the time. If you use the CLIENT LEGAL REVIEW legal advice service, through which you may seek and obtain legal advice from a third party legal services provider, NowInfinity may charge and retain a margin on those services provided by that third party. However, you acknowledge and agree that NowInfinity is not legally responsible nor liable whatsoever for the provision of, or the content or appropriateness of, any third party legal advice made available via this CLIENT LEGAL REVIEW SERVICE mechanism for use by you or your Clients. This is a referral service only. You are responsible for paying the relevant CATEGORY service fee that is confirmed to you in writing by DGF Morgan & Associates Pty Ltd or other third party legal service provider.