

Uncover real-time analytical insights

Simple Fund 360 Education Week

Hosted by:

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Intelligent, cloud-based SMSF software to streamline SMSF compliance management and administration.



Simple Fund 360 Education Week

- Building the foundation of your SMSF knowledge
- How to Setup Funds in Simple Fund 360
- **Uncover real-time analytical insights**
- Bank Data - There is more than one way to automate
- Unlock Simple Fund 360's potential by activating the Share Data Pack
- Increase your efficiency using Smart Matching and the New Documents Screen
- Pensions: How to stop, start and monitor
- SuperStream Update
- Manage Depreciation from the beginning to the end in Simple Fund 360.
- ECPI changes and Actuarial Certificates
- Creating Workpapers in Simple Fund 360
- Unlock digital signing in Simple Fund 360
- Enter Distribution Statements easily with Distribution Tax Automation.
- TBAR Management in Simple Fund 360



Housekeeping

Questions during the Webinar?

All attendees in listen only mode. The Q&A window allows you to ask questions to BGL both during and after the webinar.

1. Click Q&A to open the Q&A window. You can move this window around your screen.
2. Type your question into the Q&A box.
3. Click Send.

The webinar will be recorded

The webinar will be recorded and posted on the BGL Community. All registered attendees will also receive an email with the link to the recording.



Today's Content

- Deep dive into Entity Workflow.
- Exporting Entity Workflow results to excel.
- Analytical Insights view.
- Account view with deep dive into data.



Lets begin our journey





Join the BGL Community and connect
with like-minded professionals to
discuss all things SMSF!

community.bglcorp.com



Questions





Thank You!

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