

Distribution Tax Automation

Simple Fund 360 Education Week

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



Simple Fund 360 Education Week

- Building the foundation of your SMSF knowledge
- Learn how to Set up funds
- Uncover real-time analytical insights
- Bank Data - There is more than one way to automate
- Discover BGL's Share Data Pack
- Increase your efficiency with Smart Matching
- Learn how to stop, start and monitor pensions
- Get up to speed on SuperStream
- Manage Depreciation from the beginning to the end
- ECPI changes and Actuarial Certificates
- Create, track and manage Workpapers
- Unlock Digital Signing
- **Enter Distribution Statements easily with Distribution Tax Automation.**
- Prepare and manage TBARs



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.





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

community.bglcorp.com



Today's Webinar

1. How the Distribution Tax Automation Screen works.
2. System Tax Data
3. Entering Custom Tax Data
4. Reconciling Distribution tax Components



Before using Distribution Tax Automation

- Have the fund processed to the 30th June.
- All Cash Distributions entered.
- All Corporate Actions for the Financial Year have been processed.

Note: Distribution Tax Components are to be entered prior to year end Create Entries



Help Us Improve the Automatic Distribution Data

Send through Annual Tax Statements to add system data for securities:

distributionstatements@bglcorp.com.au

- Security is held by five or more of the funds you manage.
- Personal information is removed/scrubbed from the tax statement.

More statements provided means more accurate system data.

For more information, see: [Distribution Tax Automation – Help Us Improve](#)





Thank You!

 www.bglcorp.com

 info@bglcorp.com.au

 1300 654 401

 @BGLdot