

The benefits of transitioning to **Simple Fund 360** are invaluable!



Bedford
ca
CHARTERED ACCOUNTANTS

About Bedford CA

Bedford CA is a highly skilled and proactive firm of professional accountants and business advisors with more than 70 years of history behind them.

The team at Bedford CA pride themselves on their proactive, personalised service to their clients. They partner with their clients to set goals and develop strategies to achieve them, from start up to retirement, as well as managing their client's compliance requirements effectively every year.

The Challenge

Inefficient and difficult to use software.

Prior to making the transition to Simple Fund 360, Bedford CA legacy systems were hard to manage – everything from digital usability to simple fund processing was difficult.

“Our previous super fund software was not very intuitive and after investing a considerable amount of time and money, there were still inefficiencies in processing super funds across the firm.”

The team at Bedford CA knew they needed a much simpler solution– and they found that in Simple Fund 360.

Why Simple Fund 360

Intuitive, innovative software that adds value to our firm and clients.

“We really wanted to move to a leading software provider that demonstrates a commitment to continuous improvements to their product. Other key considerations included: If the software features were intuitive and easy to use? If the reports were easy to understand? And most importantly, if the new software would add value to our firm and our clients?”

The Solution

An intelligent, automated solution - Simple Fund 360.

“We were a bit worried about the transition to Simple Fund 360, but the process was very easy. The BGL team imported all the data from our previous software and generated all the documents to set up bank and broker feeds”.

“Now, with the bank and broker feeds up and running, we are able to obtain a lot of information from directly within the software, which has considerably reduced the volume of queries to clients”.

“Processing transactions and year-end adjustments is also really easy and BGL’s Online Help is a great resource for information on processing corporate actions and matching transactions”.

Using Simple Fund 360’s Matching Rules Screen, Bedford’s CA team can now easily view, create and manage funds’ transaction matching rules - which determines the logic Simple Fund 360 uses to automatically code transactions that feed into funds through bank feeds, CSV or other file uploads.

“My favourite time saving features in Simple Fund 360 are the “*Drag and Drop*” file import feature and the “*Transaction Matching - Create New Rule*” feature. I love being able to “*Drag and Drop*” csv files into the file import feature and by “*Creating Rules*” in the Matching Rules Screen, most of the work is done for the current and future years”.

“Finally, the BGL Support Team has been quick and

responsive to any issues we have faced so far, and the Simple Fund 360 Product Development Team is continually adding new helpful features”.

The Results

Our processing time has reduced by more than half and now we can focus on what really matters - our clients!

“The benefits of transitioning to Simple Fund 360 are invaluable.”

“As we continue to automate as much as we can, not only are we saving time on processing, but we’re also streamlining other internal procedures. This helps us to keep a competitive price structure for our clients.”

“Now we can focus on what really matters - our relationships with our clients and assisting them with their compliance.”



About Diana

An experienced, knowledgeable, pro-active and engaging Accountant with proven skills in Tax Preparation, Self-Managed Superannuation Funds, Auditing and Business Process Improvement.

Diana holds a Bachelor of Business and Commerce from University of Western Sydney, where she was awarded the 2010 Dean’s Medal. She is also a Chartered Accountant through the Chartered Accountants Australia and New Zealand, and is currently working towards her Masters in Economics and Finance through Sydney University.

Diana Porta | Client Manager

“**The intuitive and easy to use interface has led to processing efficiency. Especially for complex funds with lots of transactions, the processing time has reduced by more than half, which is incredible.**”