



SimpleFund 360 vs Simple Fund Desktop

Feature	Simple Fund 360	Simple Fund Desktop
Dashboards		
Contribution and Pension Dashboards	Yes	No
Investment Performance Dashboard	Yes	No
Fund Dashboard	Yes	No
Analytical Insights Dashboard	Yes	No
Daily Estimated Members Position	Yes	No
Accounting and Data Entry		
Automated Corporate Actions	Yes	No
International Daily Pricing - NASDAQ NYSE LSE, Hong Kong and Singapore	Yes	No
Fast Data Entry - Excel Type Format	Yes	No
Automated Foreign Conversion using RBA rates	Yes	No
Batch TBAR Reporting	Yes	No
Add New Accounts Across All Funds	Yes	No
Fully Compliant and Reversible CGT Register Entries	Yes	No
AI smart coding prediction and self learning error detection	Yes	No
Ability to create global matching and view unmatched transactions for all funds	Yes	No
Balance review / reconciliation screen	Yes	No
Data Feeds and Integrations		
Integration with PM, document providers, actuaries and over 300+ data feeds	Yes	No
Market Price and Data - Foreign	Yes	No
Daily ASX & UUT	Yes	Add on
SuperStream	Yes	Add on
Reports & Documents		
Paperless Document Delivery	Yes	No
Digital Signing of Documents	Yes	No
Create Unlimited Report Packs/Suites	Yes	No
Add Custom Letters - Editable Drag and Drop Templates	Yes	No
IT & Software Maintenance		
No Installation	Yes	No
Automatic Software Updates	Yes	No
Unlimited Users	Yes	Add on
Automatic Back-ups	Yes	No
Integration with Doc, Audit and Investment software (API)	Yes	No
Browser Access - Anywhere, Anytime, Any Device	Yes	No



“ I find the software easy to use, the online Help excellent and the Support Calls system manned by very good staff. They are polite, they listen and they try their best to get a solution as quickly as possible. ”

**Barbara Criddle,
Barbara And Graeme
Superannuation Fund**

“ I am loving the new smart matching, what a great improvement and time saver! Thank you. ”

**Rebecca Ehlen,
Nortons Business Advisors**

“ Simple Fund 360 is a wonderful product that has revolutionised the way that we perform our super fund compliance. ”

**Narelle Cipriano,
Nickless Miller Meehans**

“ Transfer of funds function to another subscription worked a treat!! It was quick and went smoothly. Good function. It was so easy to use and it worked within 15 mins of transferring too. ”

**Vicki Horton,
David B Overell Pty Ltd**

“ I’m happy that we moved to Simple Fund 360 and CAS 360. Not only are our lives so much easier, but the team’s productivity is improved, and clients are getting a better service. If you’re still thinking about moving your SMSF clients over to Simple Fund 360, don’t be afraid, it will serve you and your clients well. ”

**Christine Benson,
Poole Group**