PROFESSIONAL BASICS

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TIME: 09:00 - 13:00
CPE HOURS: 4

- Administration, navigation and help
- Connected services setup
- Creating a badge
- Customising letters and documents
- Distribution statement input
- Fast data entry
- Financial statements and reports
- Lump sum payment recording

- Migration from Simple Fund Desktop
- Period compliance
- Processing transactions
- Setting up a new SMSF from the fund’s financial statements
- Smart matching
- Tax related transactions

PROFESSIONAL ADVANCED

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TIME: 13:30 - 17:30
CPE HOURS: 4

- Actuarial certificate requests
- Bank Data Service setup
- Bank Data processing
- Contribution recording
- Corporate action processing
- Dividend distribution reinvestments
- Lump sum roll over recording
- Pension setup

- Process a contribution
- Property acquisition
- Share Data Pack setup
- SMSF Annual Return preparation
- Tax related transactions
- Year-end procedures

PROFESSIONAL PENSIONS

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TIME: 09:00 - 13:00
CPE HOURS: 4

- CGT Based processing
- Contributions splitting
- Depreciation
- Event Based Reporting
- Foreign investment purchases
- Reconciling reports
- Segregation
- Super refunds changes
- Transfer Balance Account setup

- Transfer Balance Account management
- Transfer Balance Account Report
- Transfer Balance Cap compliance
- TRIS to TRIS - Retirement Phase conversion
- XML uploads

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The Learning Channel is BGL’s on-demand, self-paced training platform for CAS 360 and Simple Fund 360 clients.

It’s a great way for you and your team to access the latest BGL training material and courses online. As a subscriber to Simple Fund 360 or CAS 360, you will receive one year complimentary access to the BGL Learning Channel from your initial purchase date.

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Full fees will apply for cancellations within 48 hours or no shows at the scheduled course.

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JULY-DECEMBER 2019
CLASSROOM TRAINING GUIDE

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