

LEVEL 1

DATE	TIME
WED 22 JUL	1:00P.M. - 4:00P.M. AEST

- Administration, navigation and help
- Creating a badge
- Setting up a new SMSF from the fund's financial statements
- Connected services setup
- Fast data entry
- Smart Matching
- Customising letters and documents
- Distribution Tax Automation
- Prepare financial statements and reports
- Lump sum payment recording
- Period compliance
- Tax related transactions

LEVEL 2

DATE	TIME
THU 23 JUL	1:00P.M. - 4:00P.M. AEST

- Actuarial certificate requests
- SuperStream registration
- Bank Data Service setup
- Contribution recording
- Corporate action processing
- Dividend/distribution re-investments
- Lump Sum rollin recording
- Smart matching
- Pension commencement
- Pension reset
- Process a commutation
- Property acquisition
- Share Data Pack setup
- SMSF Annual Return preparation
- Tax adjustments
- Year-end procedures

LEVEL 3

DATE	TIME
FRI 24 JUL	1:00P.M. - 4:00P.M. AEST

- Segregation
- XML uploads
- Depreciation Schedule
- Registry Data Service
- Contribution splitting
- Reconciling reports
- Event-Based Reporting
- Foreign investment purchases
- Super reform changes
- Transfer Balance Dashboard
- Transfer Balance Account Management
- Transfer Balance Account Report (TBAR)
- Transfer Balance Cap compliance
- Deemed segregation

LEVEL 1

DATE	TIME
MON 20 JUL	1:00P.M. - 3:00P.M. AEST

- Introduction to Corporate Governance
- How to get starting using CAS 360
- Tips and Tricks
- CAS 360 Alerts
- Annual Reviews
- Trust Management
- Reporting

LEVEL 2

DATE	TIME
TUES 21 JUL	1:00P.M. - 3:00P.M. AEST

- Officer Changes
- Member Changes
- Multi-Company Changes
- Combined Company Changes
- Documents and Lodgements
- Settings
- Reprinting Documents
- Special Purpose Companies
- Deregistrations



We understand that people learn in different ways – so we have developed a hub of supportive resources to help you at every stage in your BGL journey.



Support



Simple Fund 360 Help



CAS 360 Help



Community



Learning Channel



Training



Webinars



Youtube Channel

bglcorp.com/hub

TERMS & CONDITIONS

Simple Fund 360 3 Hour Courses

\$150.00 + GST, per course.

CAS 360 2 Hour Course

\$150.00 + GST, per course.

Payment is required for confirmation of your registration.

Cancelling / Transferring Course

Registrations can be transferred to another date, cancelled or transferred to a different attendee when you give BGL 48 hours notice before the scheduled course.

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

All webinar sessions will be **\$150 + GST**, and clients can register via the **BGL client centre**.



JULY 2020

ONLINE TRAINING GUIDE



SimpleFund360

SMSF Administration Software

Intelligent, cloud-based SMSF admin software to efficiently manage the compliance and administration of self-managed super funds.



Automation



Digital Signing



TBAR Management



Artificial Intelligence



Corporate Actions



Trustee Query



CAS360

Corporate Compliance Software

A next generation cloud-based corporate compliance software solution empowering professionals to efficiently manage company compliance.



Annual Reviews



Smart Alerts



Trust Management



Company Registration



Digital Signing



Automated Reminders

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