



APRIL 2021

ONLINE TRAINING GUIDE



SMSF Administration Software

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



Corporate Compliance Software

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



Automation



Digital Signing



TBAR Management



Annual Reviews



Smart Alerts



Trust Management



Artificial Intelligence



Corporate Actions



Trustee Query



Company Registration



Digital Signing



Automated Reminders

LEVEL 1

DATE	TIME
MON 19 APR	1:00P.M. - 3:00P.M. AEST

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

LEVEL 2

DATE	TIME
TUE 20 APR	1:00P.M. - 3:00P.M. AEST

- Officer Changes
- Member Changes
- Multi-Company Changes
- Combined Company Changes
- Documents and Lodgements
- Reprinting Documents
- Special Purpose Companies
- Deregistrations
- CAS 360 Settings

LEVEL 1

DATE	TIME
WED 21 APR	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 22 APR	1:00P.M. - 4:00P.M. AEST

- Actuarial certificate requests
- SuperStream registration
- Bank Data Service setup
- Contribution recording
- Dividend/distribution re-investments
- Lump Sum rollin recording
- Smart matching
- Depreciation Schedule & Workpapers
- 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 23 APR	1:00P.M. - 4:00P.M. AEST

- Segregation
- Registry Data Service
- Contribution splitting
- Reconciling reports
- Event-Based Reporting
- Foreign investment purchases
- Corporate Action Dashboard & BGL Smart Docs
- Transfer Balance Dashboard
- Transfer Balance Account Management
- Transfer Balance Account Report (TBAR)
- Transfer Balance Cap compliance
- Deemed segregation

All webinar sessions will be **\$199 + GST**, and clients can register via [MyBGL](#).



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

TERMS & CONDITIONS

Simple Fund 360 3 Hour Courses

\$199.00 + GST. per course.

CAS 360 2 Hour Course

\$199.00 + GST. per course.

Payment is required for confirmation of your registration.

Cancelling / Transferring Course

Registrations can be cancelled, transferred to another date or transferred to a different attendee. Notice of change must be provided 2 business days before the scheduled course or event. When the notice period is not met, full course fees will apply.

[Click Here for full T&C's](#)