

topdocs



Topdocs integration with BGL Simple Fund 360

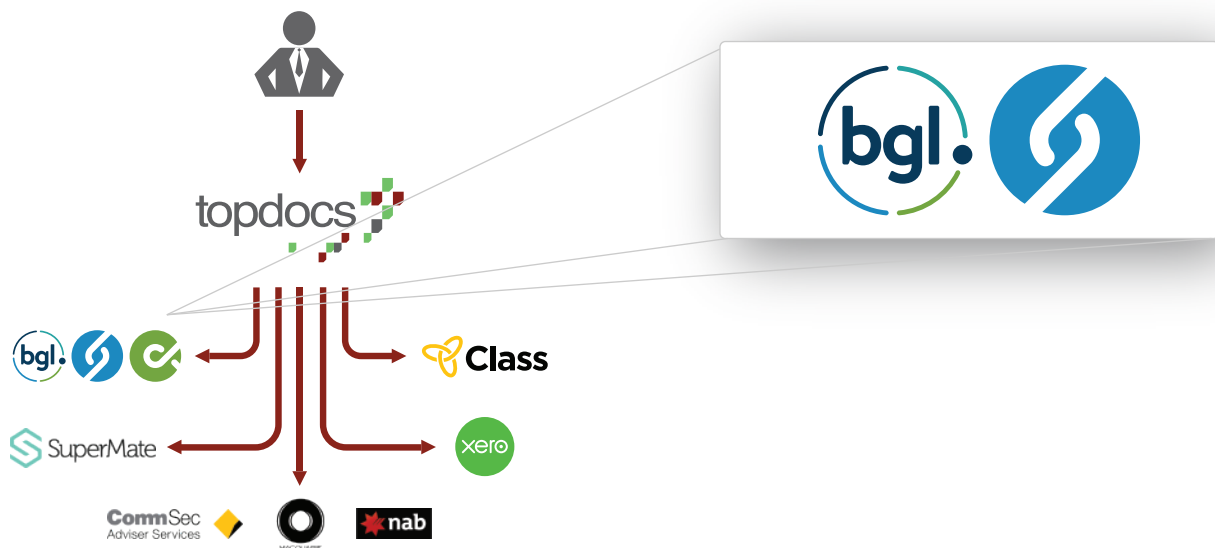
Our extensive integrations with Simple Fund 360 enable you to:

- Update your SMSF deeds without having to complete a single application form
- Have your new SMSFs automatically created in your Simple Fund 360 account
- Populate your Topdocs orders forms with Simple Fund 360 Fund data

For further information or to request a demonstration, please contact our team on 1300 TOPDOCS or support@topdocs.com.au.

USE THIS INTEGRATION WITH

- > SMSF Establishments
- > SMSF Deed Updates
- > SMSF Changes of Trustee
- > SMSF Income Streams
- > SMSF Bare Trust (bank lender)
- > SMSF Bare Trust (related lender)
- > SMSF Investment Strategies



KEY FEATURES OF THE INTEGRATION



ORDER SMSF DEED UPDATES WITHOUT COMPLETING A SINGLE APPLICATION FORM

Through our deed update integration you simply select the fund you wish to update from your Simple Fund 360 fund list, upload the current deed and we'll do the rest. No order forms to complete!



INSTANTLY SET UP YOUR SMSFs IN SIMPLE FUND 360

When you order an SMSF with us online, you have the option to have the SMSF instantly created in your Simple Fund 360 account, including all of the relevant fund, member and trustee information, without the need to rekey any client data.



POPULATE YOUR SMSF DOCUMENT ORDER FORMS

When you order any type of SMSF document with us online, you have the option to populate your order form with the fund data from your Simple Fund 360 account. Don't rekey client data - we'll populate the member, trustee and fund information for you.