



topdocs



SuperMate



Topdocs integration with SuperMate

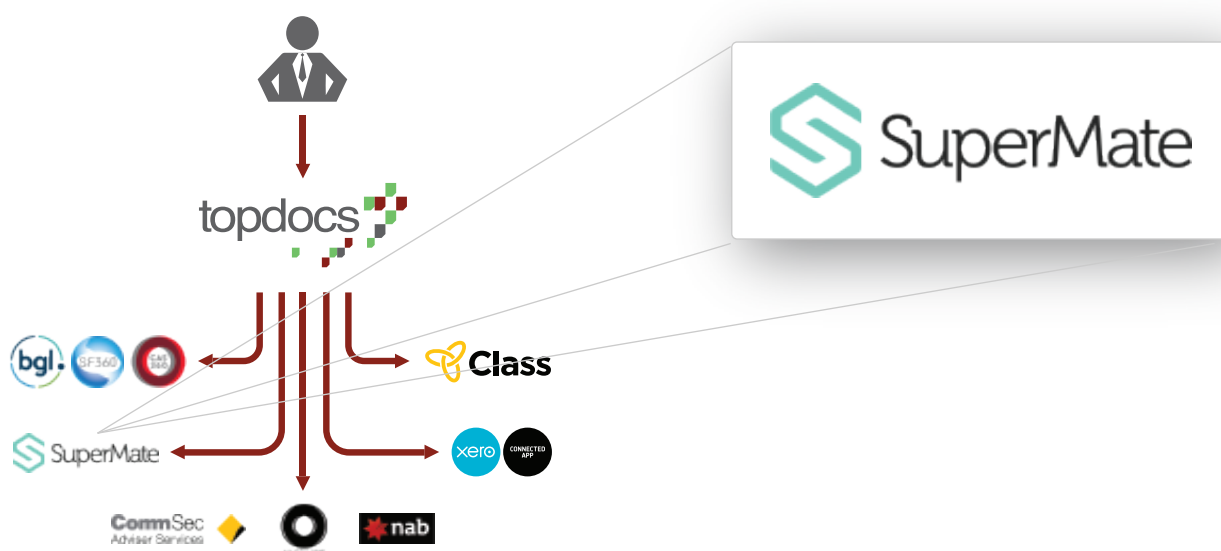
Utilise our extensive integrations with SuperMate to populate your SMSF document order forms with the data from your SuperMate account, in some cases, enabling you to place an order without entering any client data yourself.

For further information or to request a demonstration, please contact our team on 1300 659 242 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 SuperMate fund list, upload the current deed and we'll do the rest. No order forms to complete!



POPULATE YOUR SMSF DOCUMENT ORDER FORMS

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