

CONVERTING YOUR SMSF DEEDS TO TOPDOCS BGL SIMPLE FUND 360 INTEGRATION

No more order forms!

Our deed update integration with BGL Simple Fund 360 is so quick and easy, you will be amazed at how many deeds you can update in such a short time.

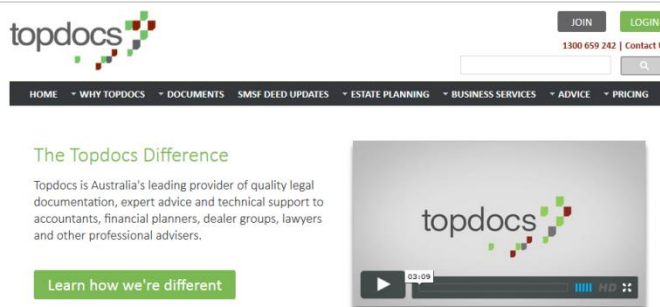
How does it work?

In two easy steps, you can update your SMSF trust deeds with Topdocs, without completing a single order form!

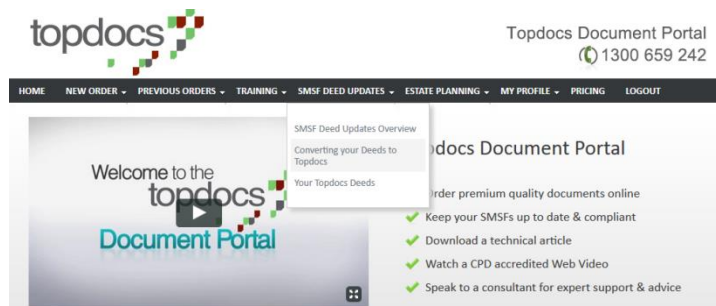
- 1) Log into the Topdocs Document Portal then using your BGL Simple Fund 360 login details, select the Funds you wish to update from your 360 Fund list
- 2) Simply upload a copy of the current trust deed for each Fund, and you are done!

To access our BGL Simple Fund 360 deed update integration, you will need to log into our online Document Portal

You can login, or Join for a free account, at our website at www.topdocs.com.au



Once you have logged in, select **Converting your Deeds to Topdocs** from the **SMSF Deed Updates** menu item



On this page you will see a number of options, select – **Convert a Fund to Topdocs using Simple Fund 360**

Converting your Deeds to Topdocs

Initial Deed Conversion \$374.00 | Annual Update Fee \$99.00

PRODUCT INFORMATION

We make the process of converting your deeds to Topdocs quick and easy through our range of deed conversion tools. No longer is the process of updating your SMSF deeds time consuming and resource hungry. Utilise our Class Super or BGL integrations to update your SMSF deeds without completing a single order form! Or if you don't use Class Super or BGL, complete our multi-fund deed update spreadsheet to streamline the ordering process.

Either way, updating your deeds with Topdocs is quick and easy!

To convert a deed to Topdocs, select a conversion tool from the list below:

- + Convert a single Fund
- + Convert Multiple Funds
- + Convert a Fund to Topdocs using Simple Fund Desktop
- + **Convert a Fund to Topdocs using Simple Fund 360**
- + Convert a Fund to Topdocs using Class Super Desktop
- + Convert a Fund to Topdocs using Class Super Cloud

YOUR TOPDOCS DEEDS

- View your Topdocs Deeds

CONVERT YOUR NON-TOPDOCS DEEDS

- Convert a Single Fund
- Convert Multiple Funds
- Convert a Fund to Topdocs using Simple Fund Desktop
- Convert a Fund to Topdocs using Simple Fund 360
- Convert a Fund to Topdocs using Class Super Desktop
- Convert a Fund to Topdocs using Class Super Cloud

INFORMATION SHEET

- Client Marketing Letter
- Deed Conversion Tools
- How to update your Deeds Annually



CONVERTING YOUR SMSF DEEDS TO TOPDOCS BGL SIMPLE FUND 360 INTEGRATION

On this page you have the opportunity to select the Funds you wish to update from Simple Fund 360, and the ability to upload the current trust deed for each Fund

To select a Fund to update from Simple Fund 360, simply click on the **Select Fund** button

You will be prompted to enter your Simple Fund 360 login details

Please note we do not store your login details in our database

CONVERT YOUR EXISTING SMSF TO THE TOPDOCS GOVERNING RULES

Receive Annual Deed Updates? Price
☐ Select All

1	Select Fund:	Please Select a Fund to Update	Select Fund	Upload	<input type="checkbox"/>
	Select Deed:		Select Deed		
2	Select Fund:	Please Select a Fund to Update	Select Fund	Upload	<input type="checkbox"/>
	Select Deed:		Select Deed		

After you provide your 360 login details, you will see a complete list of your Simple Fund 360 funds

Simply click on the Fund you wish to update, and then click on apply

Then, upload the current deed for the Fund by clicking on the **Select Deed** button

Finally, click on **Upload** to provide these details to us

Continue this process for up to 5 deeds at a time

BGL Simple Fund 360 Order Population

Please select the Fund whose details you wish to populate your order form with. You can use the search box to find a specific Fund.

Search:

Fund Name	Firm Name
<input type="radio"/> Corporate Trustee Fund	topdocslive360
<input type="radio"/> Individual Trustee Fund	topdocslive360
<input type="radio"/> Test Fund 1	topdocslive360
<input type="radio"/> Test Fund 2	topdocslive360
<input type="radio"/> Test Fund 3	topdocslive360
<input type="radio"/> Test Fund 4	topdocslive360

Showing 1 to 11 of 11 entries

Apply **Cancel**

Once you have uploaded all of the Funds you wish to update on this page, click on the **Update all Uploaded Funds now** button

You will be prompted for payment, and your Funds will be sent to our office for processing

Continue this process for as many deeds to update as you like

3	Select Fund:	Kingston Super Fund	Remove	<input type="checkbox"/>	\$374.00
	Select Deed:		Select Deed	Ready for updating below	
File upload Successful. Fund Name: Kingston Super Fund					
4	Select Fund:	Louise Matthews Super Fund	Remove	<input type="checkbox"/>	\$374.00
	Select Deed:		Select Deed	Ready for updating below	
File upload Successful. Fund Name: Louise Matthews Super Fund					
5	Select Fund:	Nigel Attard Super Fund	Remove	<input type="checkbox"/>	\$374.00
	Select Deed:		Select Deed	Ready for updating below	
File upload Successful. Fund Name: Nigel Attard Super Fund					
					<div> Total Price: \$1122.00 Update all Uploaded Funds Now </div>

MORE INFORMATION

Should you have any queries or require more information about our Deed Update integration with BGL, please contact the team at Topdocs on 1300 659 242.