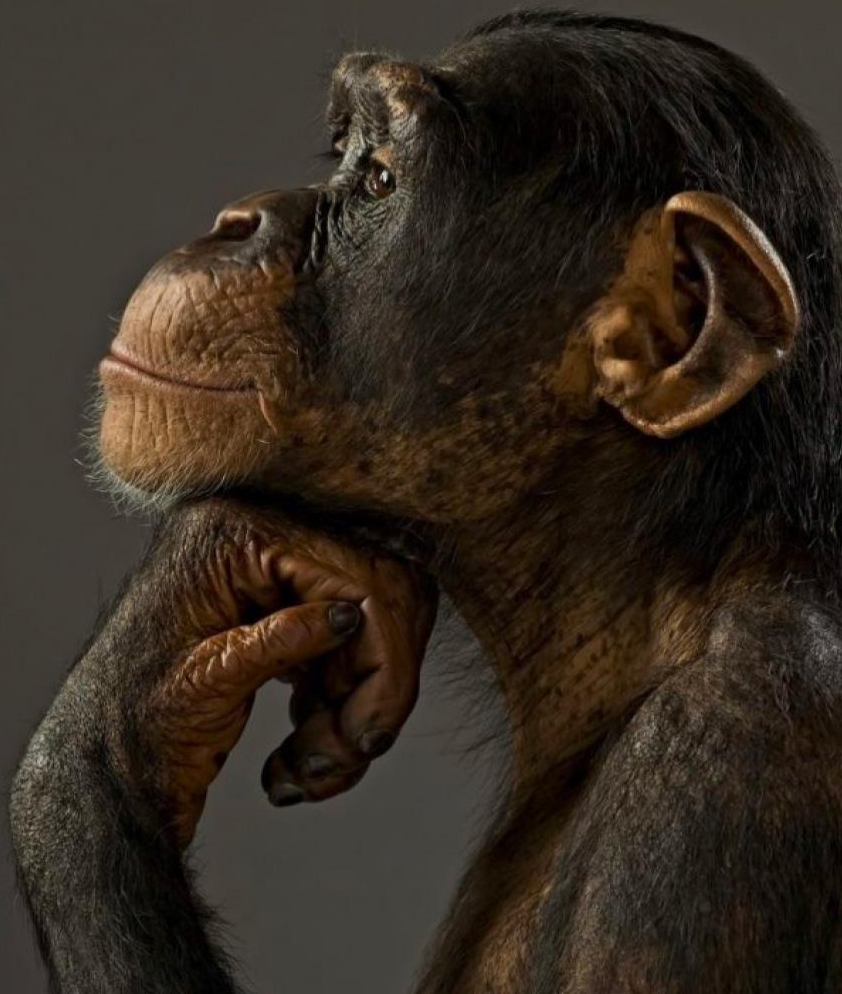


There is a **smarter** way

Aaron Dunn

CEO & Co-founder, Smarter SMSF

March 2018



About the re-brand to Smarter SMSF

Products & Membership

Membership

Integrations

Roadmap for 2018

About the re-brand
to Smarter SMSF



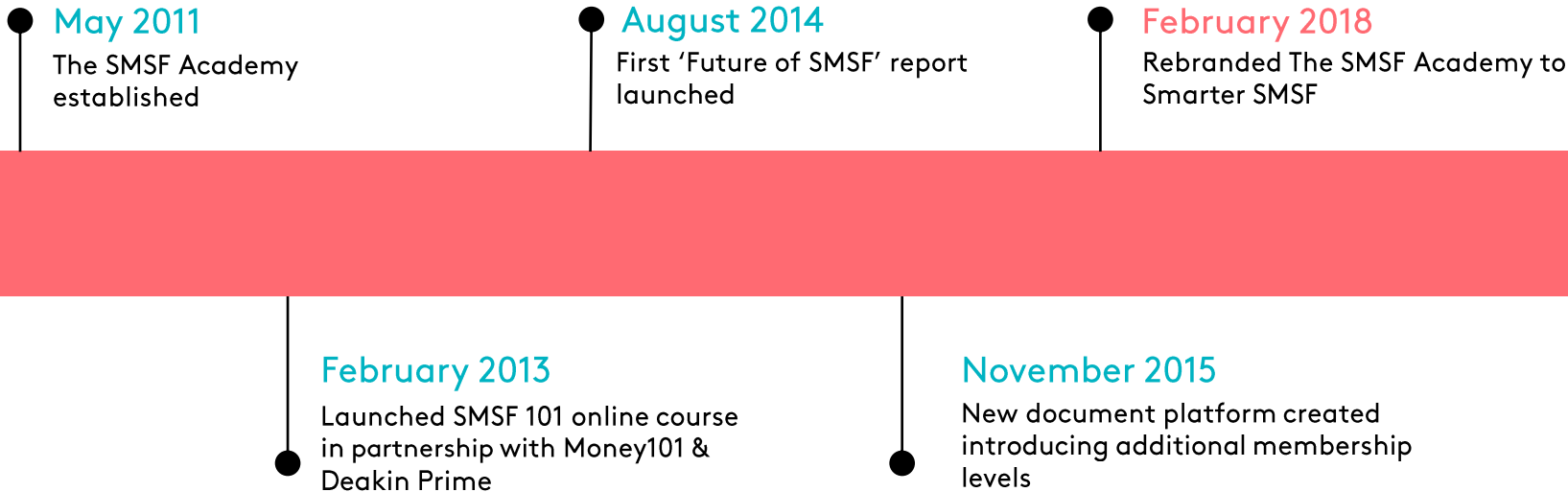
We know that the best ideas and outcomes only come from being proactive, curious and collaborative.

Smarter SMSF is the first to know and always in the know. Nimble and responsive, we create and adapt our documents as industry changes occur so they are always accurate, and you stay up to speed for your clients.



About the re-brand to Smarter SMSF

History



Products & Membership



Products

The smartest selection

All our products are available in a flexible **modular format so you can mix and match the education, training, tools and documents you need to stay at the top of your game.**

As practitioners ourselves, we know that the capacity to customise cost and time-effectively is everything. We know where pressure points can occur and understand these points can vary greatly between practices.

So we developed our online platform that works seamlessly with the cloud-based SMSF software you are using. And why we are focused on giving you the skills and information in the simplest way possible, so you can scale according to your needs, and provide better retirement outcomes for your clients.



Products



The Smarter SMSF **learning** package makes currency of knowledge an everyday experience.

As a practitioner, it enables you to stay at the forefront of the SMSF industry. Whether you want to be the expert or not, you can rely on our specialist knowledge to make sure you enable better retirement outcomes for your clients. We've leveraged our years of experience as practitioners and educators to develop this online package so practitioners can upskill without taking time away from their business.

All training is accredited for professional development obligations via the SMSF Association, FPA Australia and the major accounting bodies.



Learn: \$70 + GST p/mth or \$700 + GST p.a.



Products



Our 'create' product package comprises the most in-depth range of SMSF legal, pension and compliance documentation available in the industry.

We provide our members with online access to more than 50 specialised SMSF documents. All are best practice, current, and regularly updated. You can seamlessly generate these documents using our integrations with BGL's Simple Fund 360, CAS360 and Class Super.

- ✓ **Create: \$250 + GST p/mth or \$2,500 + GST p.a.**
- ✓ **Create (Legal): \$900 + GST p/mth**
- ✓ **Ability to purchase on PAYG basis**



Products

 support

Enjoy the confidence that comes with expert support on everything to do with SMSF by accessing the Smarter SMSF support package.

The Smarter SMSF knowledge team is available via the SMSF platform and on the phone to resolve any issue or answer your SMSF technical questions. Our team of software experts is also available to ensure Smarter SMSF products deliver a consistent and seamless experience every time.

Our support service is designed to help you stay up to speed on SMSF without taking time away from what you do best. Sure fire support.



Support: \$90 + GST p/mth or \$900 + GST p.a.

Integrations



Create

Role of integrations

Leverage the benefits of cloud technology to seamlessly **create SMSF legal, pension & compliance documents**

Integrations with Simple Fund 360, CAS 360 and Class allow you to generate fund documents from your existing SMSF data, **plus** enable you to create and update your fund information within your SMSF software instantly.



Submitted |

BGL Simple Fund 360 |

SF360 - Documents

Secure | https://app.thesmsfacademy.com.au/simple-fund-360/

AppsATOBankingCPA AustraliaLegislationLearning & StrategySMSFSMSF360GoogleInfusionsoftThe SMSF AcademySocial MediaEzyVAOther bookmarks


smarter smsf

DashboardDocumentsSupportTrainingToolsIntegrations & Add-onsProfileAdmin

BGL Simple Fund 360

HomeBGL Simple Fund 360

SF 360CAS 360

SimpleFund 360

Status: Connected.

Disconnect

Create SMSF Deed Update


Create SMSF Pension


Create SMSF Pension Rollback

Create Partial Commutation


Create SMSF Borrowing

Create Lump Sum Payment

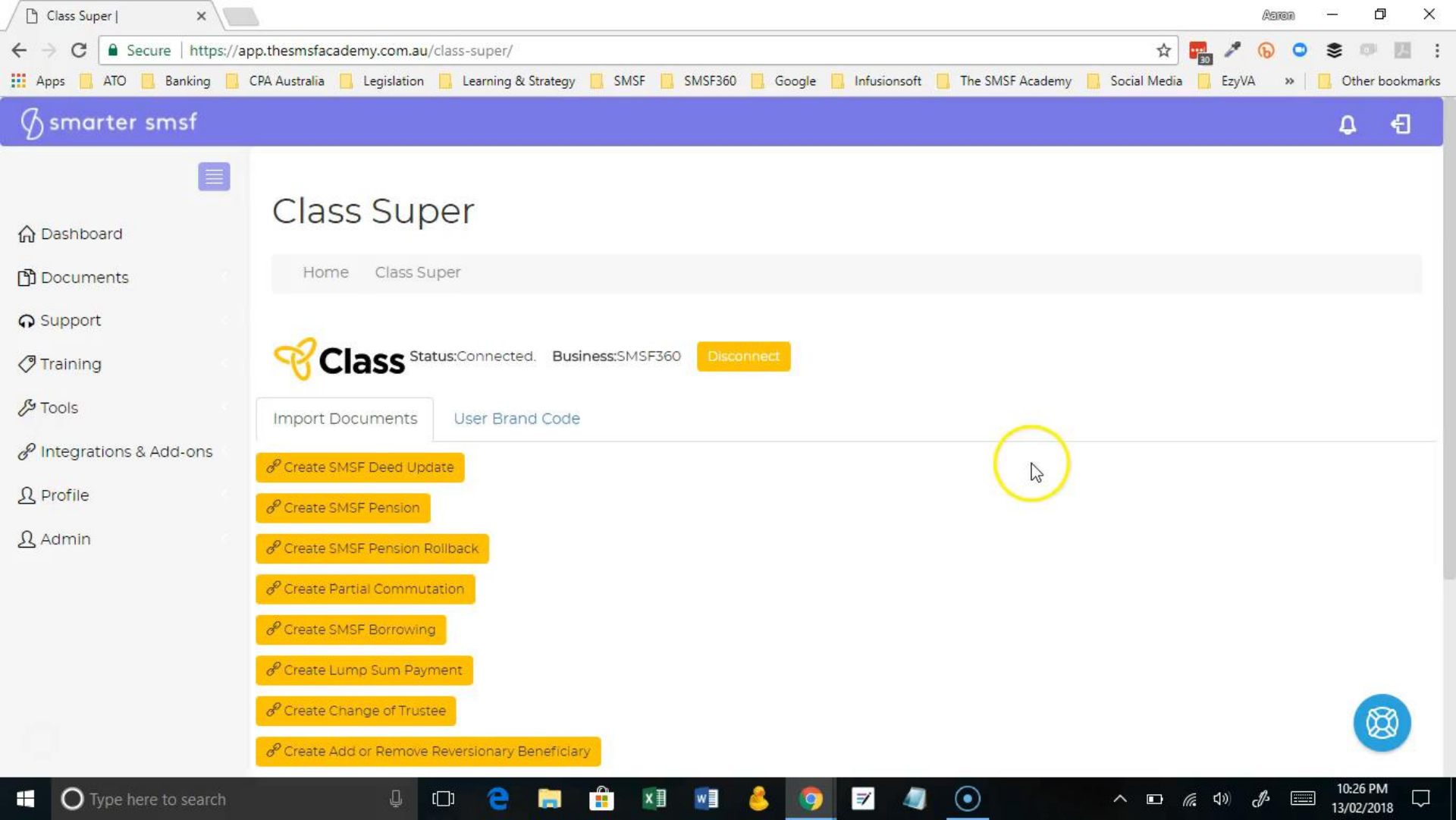




Type here to search



8:55 PM
13/02/2018



app.thesmsfacademy.com.au/order/submitted/?paged=2

AppsATOBankingCPA AustraliaLegislationLearning & StrategySMSFSMSF360GoogleInfusionsoftThe SMSF AcademySocial MediaEzyVAOther bookmarks

smarter smsf

DashboardDocumentsSupportTrainingToolsIntegrations & Add-onsProfileAdmin

Submitted

Home > Order > Submitted

Search

Refresh

Order ID	Reference	Entity	Type	Date	Status	Actions
13412046	SMIT001		CGT Relief Minute - Proportionate Method	26/11/2017	complete	Actions
13412045	Jones001		CGT Relief Minute - Proportionate Method	26/11/2017	complete	Actions
13412044	TEST001		CGT Relief Minute - Proportionate Method	26/11/2017	complete	Actions
13412028	SMIT001		CGT Relief Minute - Proportionate Method	23/11/2017	complete	Processing
13412027	Jack SMSF		CGT Relief Minute - Proportionate Method	23/11/2017	complete	Processing
13412026	Jack SMSF		CGT Relief Minute - Proportionate Method	23/11/2017	complete	Processing
13311964	Sample SMSF		CGT Relief Minute - Segregated Method	21/11/2017	complete	Actions
13311840	ABC		CGT Relief Minute - Segregated Method	15/11/2017	complete	Actions
13311077	TEST001		Advice Helpline - Pension Commencement	15/11/2017	complete	Actions

9:34 PM13/02/2018

Roadmap 2018



Smarter SMSF

Upcoming Documents

Here's what is on scope at the moment...

- Unit Trust (and related constitution)
- Death of a member
- Integrated approach to adding and removing a new member
- Unlicensed advice docs & support (in conjunction with L4A)
- Fund Member's Guardian (addressing elder abuse issues, etc)
- And much more... **goal** is 80 SMSF legal, pension & compliance docs by end of 2018!



Smarter SMSF

Roadmap 2018

Here's what we are focused on for the year ahead...

- Tweaks to SMSF training (more online courses with Q&A discussion)
- Grow to over 80 SMSF legal, pension & compliance documents
- Increasing focus on integrations, including addition of Super Mate
- Building 'smart flows' to seamlessly work through stepped processes for establishing and maintain a fund, including key strategies
- Regular 'smarter thinkers' sessions (members-only)
- Adding 'advice' tools to supported both licensed and unlicensed professionals
- Updating ABR registration process with SBR



Smarter SMSF

Special Offer

Arrange for a 14 day trial and take up one or more modules of learn, create & support and **save 20% off the membership price for the life of your subscription.**

Subscription must occur before Friday, 23 March 2018

Thank you!

T 1300 95 94 76

team@smartersmsf.com