

Dear client,

I hope this letter finds you well. I am writing to you let you know an important update regarding the management of your Self-Managed Super Fund (SMSF) and how we can enhance its efficiency and compliance.

As you may be aware, HandiLedger has been a reliable tool in the past; however, it is not specifically designed for SMSF accounting and administration. Given the complexity and the specific needs of SMSF management, HandiLedger will eventually be phased out in our practice. To ensure that your SMSF continues to receive the best possible service, we are transitioning to BGL's software solutions.

Why BGL?

BGL software is renowned for its SMSF-specific features, offering:

- **SMSF-Focused Compliance:** Ensures your fund stays aligned with regulatory requirements.
- **Comprehensive Financial Reporting:** Delivers detailed financial statements, member summaries, investment overviews, and thorough capital gains tax reporting.
- **Intuitive User Interface:** Makes managing your SMSF more streamlined and collaborative.

Additional Services:

We are also offering the following to enhance your SMSF management:

- **Free Electronic Service Address (ESA):** Vital for receiving ATO and superannuation entity communications.
- **Linked Bank Feeds (At a Small Annual Cost):** Connects your SMSF's bank account to BGL for real-time transaction tracking.
- **Investment Feeds - Share Data Pack (At a Small Annual Cost):** Keeps your investment portfolio updated automatically.

Please let us know if you would like to take advantage of linking the Bank Feed and the Investment Feed (Share Data Pack) to your SMSF. These tools can significantly enhance the efficiency and accuracy of your fund's management.

The transition to BGL is a step forward in providing superior service and compliance for your SMSF. We understand changes can be challenging, but our team is here to ensure a smooth and supportive transition.

Should you have any questions or need further details, do not hesitate to reach out. We are here to assist you in every way possible.

Thank you for your continued trust in our services. We are enthusiastic about managing your SMSF with these advanced capabilities.



*Octopus Accounting & Tax Advisory
is a CPA practice
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Warm regards,

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Partner

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