

Actuarial Certificates

Heffron Actuarial Certificates come with complimentary benefits supported by your SMSF specialists. From **\$100 per certificate (ex. GST)**

All your actuarial certificate needs can be met with flexible functionality, quick turnaround and plenty of support with our efficient, accurate and friendly service.

Our complimentary benefits and features include:

1. **Super Insights Monthly Newsletter:** Written by experts who know your world. Get practical help, strategic insights, technical expertise you can trust and use.
2. **SMSF Clinics:** Free admission to our interactive workshops. Join the discussion, ask your questions and receive practical answers you can rely on.
3. **Knowledge on demand:** Easy access to our regularly updated News & Insights page which provides specialist technical knowledge written by our team of SMSF experts.
4. **Super fast service:** For Class and BGL360 users we deliver within minutes. For others we deliver within hours.
5. **Extra support when you need it:** Our in-house Actuarial Certificates specialist team is available – use Live Chat via the wizard, [email](#) or phone 1300 433 376.
6. **Various software:** We have integration with Class and BGL360 plus we support all other software.

To find out how we can help you with your Actuarial Certificates through Class, BGL360 or another provider please contact us via actcert@heffron.com.au

See over for our volume package details.



Get in touch today.

1300 HEFFRON
www.heffron.com.au
actcert@heffron.com.au

Certificate Plus

Heffron Actuarial Certificate Plus package is available for Class and BGL360 clients with 20+ funds.

\$130
per certificate
(ex. GST)

Certificate Plus is available to firms ordering over 20 certificates per year and includes all complimentary benefits PLUS the following package items.

Certificate Plus	
Bronze Package	20-49 Certificates pa <ul style="list-style-type: none">• Our monthly newsletter Heffron Super Insights (normally a paid subscription)• 3 x calls per year to our SMSF technical team on any SMSF issue• 1 x attendee Quarterly Technical Webinar
Silver Package	50-99 Certificates pa <ul style="list-style-type: none">• All of the Bronze package inclusions, PLUS• 1 x attendee Heffron Super Intensive Day
Gold Package	100-199 Certificates pa <ul style="list-style-type: none">• Our monthly newsletter Heffron Super Insights (normally a paid subscription)• 4 hours x per year of support from our SMSF technical team on any SMSF issue• Up to 5 attendees Quarterly Technical Webinar• 1 x attendee Heffron Super Intensive Day
Platinum Package	200+ Certificates pa Inclusions by negotiation

See over for details on how to order.

Get in touch today.



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actcert@heffron.com.au

Guide to request Actuarial Certificates

Our Actuarial Certificates are quick and easy to order.

Follow these steps to obtain your certificate and benefit from the automatic data pre-population.



Class	BGL 360
<p>SET HEFFRON AS DEFAULT PROVIDER</p> <ol style="list-style-type: none"> 1. Go to Settings → Fund Defaults 2. Select 'Heffron' as your Actuarial Certificate Provider and Save <p>HOW TO REQUEST A CERTIFICATE</p> <ol style="list-style-type: none"> 3. Go to Periodic Processing → Period Updates 4. Ensure last period update is set to the end of the financial year 5. Select Request Actuarial Certificate 6. Review fund and member data and Request from Heffron 7. Click Here to access Heffron Actuarial Wizard and complete the request 	<p>HOW TO REQUEST A CERTIFICATE</p> <ol style="list-style-type: none"> 1. Go to Compliance → Period compliance 2. Create Entries at the end of the financial year 3. Go to Member → Fund Pension Policies 4. Select New Actuarial Certificate 5. Select Financial Year and Request Actuarial Certificate 6. Select 'Heffron' as your Actuarial Certificate Provider and click Next 7. Confirm Segregation Eligibility and Submit to Actuary 8. Click Here to access Heffron Actuarial Wizard and complete the request

BGL SIMPLE FUND, SUPERMATE AND OTHER

To find out more about prices contact the Actuarial Certificates team via [email](mailto:actcert@heffron.com.au) (actcert@heffron.com.au) or call 1300 433 376.

For those who use software other than Class and BGL360 and who like to enter their own data [click here to go to the Member Portal](#).

EXTRA SUPPORT WHEN YOU NEED IT

Our Actuarial Certificates team is there if you need support – at the end of the phone, per live chat inside the Actuarial Certificate wizard or via [email](#).

While Heffron believes that the information contained in this Fact Sheet is reliable in April 2020, readers should note that it is intended to provide background information only and does not purport to make any recommendation upon which you may reasonably rely without taking specific advice. In particular, it should not be considered financial product advice for the purposes of the Corporations Act 2001.