



**accountantsGPS<sup>®</sup>**

## Video Transcript

**George Haramis – CEO & Co-Founder** – accountantsGPS was created to provide a range of digitally supported services for the accounting profession commencing with the creation of the SMSF checkup report.

Recently, accountantsGPS and the SMSF checkup report reached the finals of the 2023 Technology Scale Up Awards which was a fantastic result given that we've only been in operation for four to five months.

We decided to create the SMSF checkup report which is a factual report that can be produced in minutes so that the accountant can engage their SMSF clients in a very strategic way. It allows the accountant to finally look behind the numbers without the need to obtain a licence.

**Aaron Williamson – Head of Product** – It's a very comprehensive report. The best part about it is all of the information that's required is actually pre-populated from the accounting or administration software. This means the accountant should be able to produce the near 30 page report in less than five minutes, which is really handy.





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## Video Transcript (Cont.)

**George Haramis – CEO & Co-Founder** – The SMSF checkup report also allows the accountant to spend time looking at a range of specific and strategic areas, covering such things as compliance and regulatory requirements, reviewing where their asset allocation is versus their investment, policy statement, looking at insurances, retirement planning, the types of documentation.

The SMSF has performances across different asset classes, including direct property. Also importantly, looking at various contribution strategies and a whole host of other areas that you would normally not be able to produce manually.

Users of the platform can also utilise the Money GPS platform which is our sister company and that provides digitally supported client led compliant statements of advice.

**Aaron Williamson – Head of Product** – For accountantsGPS is a BGL user. You know, once you create an account and you authenticate your BGL account you can actually then choose the subscription level that best suits you.





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## Video Transcript (Cont.)

**Aaron Williamson – Head of Product (Cont.)** – We have a number of different tiers that allow different amounts of reports to be used for free each month right up to our enterprise and that allows unlimited usage of the reports.

**Grace Rando – GPS Coach** – We are here to help you create your first self-managed super fund checkup report and answer any questions you may have in relation to the report or to the accountantsGPS platform.

**END**

