



accountantsGPS[®]

Instruction Video Transcript

Welcome to the accountantsGPS instructional video. To get started, click on "Create Account" in the top right-hand corner. Choose the email address you'd like to use for this account and then create a password. During this sign-up process, we'll ask for your BGL login details, so it's crucial to have them on hand. Please refrain from refreshing or leaving the page, as it will interrupt the account creation process. Click "Sign In" after entering your details.

You'll receive a verification code from BGL. Once that's done, our platform will send you a six-digit verification code to the email used for the signup process. This is a security measure and may take 10 to 20 seconds to arrive. After confirmation, your business details should pre-populate from BGL. Click "Next" and you'll see different subscription options - monthly and yearly. Read the descriptions carefully, as each comes with corresponding benefits. Choose your plan, hit "Subscribe," and you'll be directed to a checkout experience where you can enter your credit card details. Ensure the plan is correct and click "Subscribe." After processing (don't leave or refresh), you'll be logged into the platform.

Once logged in, navigate to account settings to check your subscription details, including cycle, renewal date, price, and inclusions. If your plan includes the Money GPS Digital Advice programme, your referral code will be here.





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Below, you'll see your usage limits if applicable. Change your subscription, upgrade, downgrade, or cancel from this section.

When ready to create a report, go to the SMSF checkup report card. Ensure your BGL consent is up-to-date and click "View List." You'll see a list of all managed funds in BGL, with a traffic light system indicating report creation status. Use the search function if needed. Select the fund for the report, view fund and member details, and check fund activity. Click "Create New Report" to begin the survey. Most information will be pre-filled, with a few questions to answer. The investment strategy may need manual entry for the investment strategy analysis.

Complete the questions, hit "Review," then "Submit." Our backend calculation engine will produce a report, viewable on-screen or as a downloadable PDF. Once finalised, the report screen shows a summary. Download or view the report. The report covers various aspects, including investment strategy, asset allocation, cash analysis, fund performance, and benchmarking. It also addresses costs, estate planning, re-contribution strategies, contributions, downsizing, and retirement projections. Property reviews cover value, rental, and growth performance. Appendices include estate planning and insurance services for self-managed super funds.





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Back on the homepage, scroll down for access to service providers, offering services like estate planning and refinancing. In account settings, update your details, change your password, update billing information, BGL consent, and manage your subscription details.

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