

Portal

by BGL.



What is Portal?

Portal is an online client collaboration application that is fully integrated with your CAS and Simple Fund software.

Portal will add real-time client interaction to your existing website by providing a unique automated document delivery, retrieval and reminder system.

Portal will:

- Securely deliver documents direct to your client
- Remind your client to process the document
- Inform you when your client has processed the document
- Automatically update your BGL software during all stages of the process

How much does it cost your practice to get a document out the door?

Every day you receive numerous requests for information from clients, advisers, auditors, bank managers, brokers, incorporation specialists, company officers and shareholders. Most professional firms deliver this information by mail or email, but these delivery methods have proved to be both slow and inefficient.

Portal immediately adds efficiency to your practice by shifting the way you interact with your clients and third parties. Instead of waiting for mail or searching through multiple email accounts, Portal allows you to easily manage these requests with greater efficiency through your existing website.

Why should I invest in Portal?

Portal provides you and your clients many benefits:

- Significantly reduces the cost of providing your clients with documents and information
- Secure transmission of documents to client, auditor, adviser, bank manager, other SMSF stakeholders

- Automatically tracks all inbound and outbound communications
- Low training and set up costs
- Integrated document management
- Powerful branding for your firm
- Hosted solution so no internal IT support, no updates, no server costs

For Simple Fund:

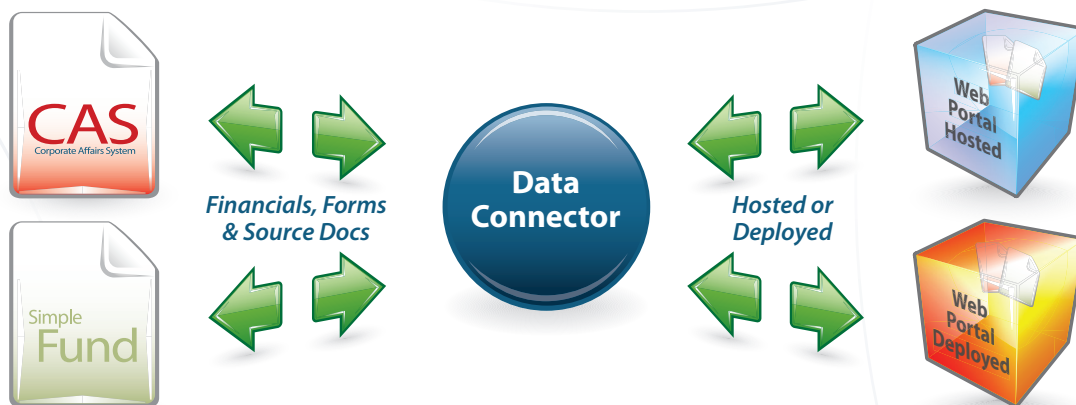
- Automatically uploads annual financial statements, tax returns, investment reports and member statements and notifies client
- Automates the signing process for annual documents
- Automates the collection of client source documents
- The ability to request investment reports at any time
- The ability to view, update and notify changes to the fund's investment strategy

For CAS:

- Automatically uploads annual reviews / returns and notifies client
- Automates the review process for annual reviews / returns
- Automatically uploads documents prepared for company changes and notifies client
- Automates signing process for all documents
- Automates the collection of data for company incorporations
- Provides access to company registers and company summaries

How does Portal work?

Your CAS and Simple Fund software connects to Portal through a Data Connector. The Data Connector is installed on your computer together with your existing BGL applications. When you generate reports or change data in CAS or Simple Fund the Data Connector works in the background to securely send data to and from the Portal, ensuring all parties have access to timely information.



Portal is hosted in a secure data centre. You need no additional IT staff or computer hardware and never have to worry about managing the Portal.

How much is my investment in Portal?

Portal pricing is calculated on an amount per entity per annum. Portal access is purchased in packs of 25 entities and can be paid quarterly or annually in advance. Clients can upgrade the number of entities at any time. Annual Subscriptions attract a discount over the quarterly price. All prices include GST.

Clients who wish to host portal on their own servers should contact BGL for pricing.

Companies hosted from \$4.40 per annum

Number of Companies	Quarterly subscription	Annual subscription
25	\$66.00	\$220.00
50	\$132.00	\$440.00
100	\$264.00	\$880.00
250	\$660.00	\$2,200.00
500	\$1,237.50	\$4,125.00
750	\$1,732.50	\$5,775.00
1,000	\$2,145.00	\$7,150.00
Amount per company over 1,000 companies	\$1.32	\$4.40

Funds hosted from \$6.60 per annum

Number of Funds	Quarterly subscription	Annual subscription
25	\$123.75	\$412.50
50	\$247.50	\$825.00
100	\$495.00	\$1,650.00
250	\$1,237.50	\$4,125.00
500	\$2,227.50	\$7,425.00
750	\$3,052.50	\$10,175.00
1,000	\$3,712.50	\$12,375.00
Amount per fund over 1,000 funds	\$1.98	\$6.60

Subscriptions are paid in advance. Excess usages charges apply to clients who exceed traffic quotas of 15MB per company per annum or 60MB per fund per annum.

If you would like to learn more about Portal by BGL, contact the BGL Sales and Marketing Team by email at info@bglcorp.com.au or call us on 1300 654 401

Your Partner in Compliance

BGL

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