

Client success story

A simple + smarter way for NorthCorp



Bart Lawler, CA

Partner - SMSF and Auditor at NorthCorp Accountants

It is great to get our SMSF documents and training all delivered by one reputable provider - Smarter SMSF. I have known Aaron from attending various conferences in the past and was always impressed by his knowledge in SMSF, his connections in the industry and his ability to provide in depth training and support.

Your challenge?

Increase productivity and ensuring document accuracy with a SMSF specialist

NorthCorp's previous SMSF document provider of trust deeds and establishment of companies declined over time and failed to keep up with technology improvements.

The direct result triggered a negative impact on our productivity and increased the time spent by staff resources ensuring document accuracy.

Continuous professional development training was ad hoc and topics of a general nature only. Time allocated to events wasn't effective and information communicated to staff was challenging. A training solution was required to be efficiently delivered to staff and meet the needs of the team.

Why Smarter SMSF?

The ease and accuracy of ordering SMSF documents along with quality professional training options



The process of ordering SMSF documents is simple to use and the integration with BGL's Simple Fund 360, which allows for information to pre-populated and this reduces errors.

The range of professional development training available has greatly benefited our team with a mixture of webinars and interactive face to face workshops to attend.

Accessing the Smarter SMSF learning suite for recorded webinars provides the extra layer of flexibility for our team to meet their CPD hours.

The solution

Accessing an extensive variety of SMSF documents and personal support with Smarter SMSF

Smarter SMSF has delivered a subscription service for ordering our SMSF documents at a cost effective price that suits the size of our business.

Our subscription has provided us access to an extensive variety of SMSF documents available for ordering. If we require assistance, we can easily contact the team at Smarter SMSF and get answers to our questions.

We chose Smarter SMSF because of their extensive list of SMSF documents and the integration with BGL's products.



About NorthCorp

NorthCorp is a firm of chartered accountants based in Port Macquarie and has a long history dating back to 1953. Together with the financial planning section, NorthCorp Wealth Management are experts in wealth management and self managed super funds.

The scale of operation enables us to provide a high quality range of services including wealth management and retirement planning, professional taxation and business services, accounting, audit services and superannuation to all clients ranging from small individuals to large size businesses.

The results

Smarter SMSF streamlined our processes, created efficiencies and delivered valuable training

Now that we have a document subscription with Smarter SMSF, it has streamlined our document ordering process for our funds.

We have been able to make good use of the software integration between Simple Fund 360 & CAS360 with the Smarter Platform. The ordering process has created many efficiencies as the information pre-populates the templates, which in turn, reduces errors.

The CPD training provided by Smarter SMSF has improved my ability to provide training to all staff and tailor it to their specific needs.

The regular monthly and timely training across a vast range of topics delivers a wealth of knowledge, especially the quarterly training event, the Changing Face of SMSF.

About Bart Lawler

Bart is a Partner at NorthCorp Accountants and is their SMSF specialist and Auditor.

NorthCorp was founded in 2004 and today employs a team of 21 people across an extensive range of backgrounds in the Accounting, Audit and Wealth Creation roles.

Bart graduated from University of Southern Queensland and is currently based in Port Macquarie, Australia.

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