

# Prompt personalised service the Smarter way

Client success story



## Mathew George

Highly accredited professional providing business and financial management, taxation, auditing, and financial services

*“They are experts who provide timely assistance that is readily available if and when we need to sort through any issues we may be having.”*

## The challenge?

How to comply with legislative and regulatory requirements and provide solutions to clients.

We were sourcing various products from multiple providers to enable us to comply with legislative and regulatory requirements. This was a long-term problem to manage and coordinate.

The ability to continually provide solutions and services to our clientele in a timely manner and tailor-made for their requirements.

## Why Smarter SMSF?

The Smarter Platform is simple and effective to use.

*“It’s the ease of use. The Smarter Platform is simple and effective.”*

*“They are experts who provide timely assistance that is readily available if and when we need to sort through any issues we may be having.”*

*“The Bulk ordering of documents allows us to determine our pricing strategy without any surprises or price changes”.*

## The solution

Smarter SMSF came to our attention through BGL / Simple Fund 360.

SA bulk subscription allows us to use the Smarter SMSF platform to use a variety of products that are available and the documentation is immediately available for us to print off and use. Besides, Smarter SMSF also provides a very helpful helpline in the event that any specialist assistance was required.

## The results

The platform is easy to use and well-designed.

It allows us to use their products instantly and a bulk order like we choose to do with Smarter SMSF enables us to offer the service to our clients at very reasonable prices.

**ROBERTSON &  
GREENWOOD**

### About Robertson and Greenwood

Robertson and Greenwood have a proud and long-established reputation for providing clear and practical advice to help their clients comply with their legislative obligations and to grow and succeed in their business environments.

They specialise in working closely with their clients to help them achieve their business and wealth creation goals.

### About Mathew George

Mathew has been a partner since 2003 and the Principle since 2006.

Mathew is a highly accredited professional providing business and financial management, taxation, auditing, and financial services to clients across many varied industries.

Mathew's focus is building and developing strong client relationships. With personal experience and responsibility for ensuring the running of a small business, he takes great satisfaction in seeing clients and their businesses grow as a result of the collaborative partnership.

[www.randg.com.au](http://www.randg.com.au)