

Helping to make Smarter decisions

Client success story



Mathew George, Chartered Accountant

Principle - SMSF, Audit and Assurance, Taxation and GST

“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. We were creating and managing our own SMSF templates which is time consuming and challenging as the laws change.

This was a long-term problem managing and coordinating up-to-date and consistent product information, across multiple technology applications.

It was a real challenge to maintain the ability to continually provide solutions and services to our clients, all in a timely manner and tailor made for their requirements.

We needed a way to improve our efficiencies and processes.

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.”

We are BGL, Simple Fund 360 software users and discovered the integration link across to the Smarter SMSF Document Platform.

Looking at improving our SMSF document generation and ongoing maintenance, we contacted Smarter SMSF. From the beginning, they demonstrated the ease of using the two systems and the flow of client data from one application to another to generate a compliant and professional-looking document.

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The discussion led to the efficiencies of a document subscription and the economic cost benefits of purchasing a number of documents and lowering the overall purchase costs.

The solution

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

We contacted Smarter SMSF and they were able to analyse our current scenario. They examined the fact we maintained our own documents, identified process inefficiencies and were able to tailor a business solution that immediately helped improve our workplace practices.

Our bulk document subscription now allows us to use the Smarter SMSF platform and access an extended range of SMSF documents, well beyond our original document needs. We have available a variety of products to use to resolve client scenarios we had never been able to deliver on.

We like that we can access the Smarter platform anytime, from either the BGL system or via the platform directly. Documentation is immediately available for us to print off and use. The Smarter SMSF team also provides very helpful support. If special assistance is required, technical or practical solutions are found. We can continue to deliver our services to our clients.



About Robertson and Greenwood

Robertson and Greenwood have a proud and long-established reputation commencing way back in the early 1980s. They specialise in working closely with their clients to help them achieve their business and wealth creation goals.

Robertson and Greenwood are known for providing clear and practical advice to help their clients comply with their legislative obligations and to grow and succeed in their business environments.

The results

The platform is easy to use and well-designed.

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The Smarter SMSF platform allows us to use the Smarter products instantly allowing us to accomplish a variety of mini-projects including the bulk ordering of Trust Deed Upgrades.

We choose Smarter SMSF because of their initial consultation and support. They are our document provider as they enable us to deliver our service offering to our clients at very reasonable prices.

The bulk ordering has allowed us to be price competitive and to provide the service at a time when we are ready or our clients require us to do so.

Buying the documents from one provider also allows us to get familiar with the products we are using which was not possible when we were sourcing them from several different providers previously.

About Mathew George

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

Mathew is a highly accredited professional providing business and financial management, taxation, auditing, and advisory 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.

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