Guide to request Actuarial Certificates

Our Actuarial Certificates are quick and easy to order.

Follow these steps to obtain your certificate and benefit from the automatic data pre-population.

Class	BGL 360
SET HEFFRON AS DEFAULT PROVIDER	**HOW TO REQUEST A CERTIFICATE**
1. Go to **Settings → Fund Defaults**	1. Go to **Compliance → Period compliance**
2. Select **'Heffron'** as your Actuarial Certificate Provider and **Save**	2. **Create Entries** at the end of the financial year
HOW TO REQUEST A CERTIFICATE	3. Go to **Member → Fund Pension Policies**
3. Go to **Periodic Processing → Period Updates**	4. Select **New Actuarial Certificate**
4. Ensure last period update is set to the end of the financial year	5. Select **Financial Year** and **Request Actuarial Certificate**
5. Select **Request Actuarial Certificate**	6. Select **'Heffron'** as your Actuarial Certificate Provider and click **Next**
6. Review fund and member data and **Request from Heffron**	7. Confirm **Segregation Eligibility** and **Submit to Actuary**
7. Click **Here** to access Heffron Actuarial Wizard and complete the request	8. Click **Here** to access Heffron Actuarial Wizard and complete the request

BGL SIMPLE FUND, SUPERMATE AND OTHER

To find out more about prices contact the Actuarial Certificates team via **email** (actcert@heffron.com.au) or call **1300 433 376**.

EXTRA SUPPORT WHEN YOU NEED IT

Our Actuarial Certificates team is there if you need support – at the end of the phone, per live chat inside the Actuarial Certificate wizard or via **email**.

Fact Sheet