

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

- 1. Go to Settings → Fund Defaults
- 2. Select 'Heffron' as your Actuarial Certificate
 Provider and Save

HOW TO REQUEST A CERTIFICATE

- 3. Go to Periodic Processing → Period Updates
- **4.** Ensure last period update is set to the end of the financial year
- 5. Select Request Actuarial Certificate
- **6.** Review fund and member data and **Request from Heffron**
- 7. Click **Here** to access Heffron Actuarial Wizard and complete the request

HOW TO REQUEST A CERTIFICATE

- 1. Go to Compliance → Period compliance
- 2. Create Entries at the end of the financial year
- 3. Go to Member → Fund Pension Policies
- 4. Select New Actuarial Certificate
- Select Financial Year and Request Actuarial Certificate
- Select 'Heffron' as your Actuarial Certificate Provider and click Next
- Confirm Segregation Eligibility and Submit to Actuary
- **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.

While Heffron believes that the information contained in this Fact Sheet is reliable in May 2020, readers should note that it is intended to provide background information only and does not purport to make any recommendation upon which you may reasonably rely without taking specific advice. In particular, it should not be considered financial product advice for the purposes of the Corporations Act 2001.

