



G P OSBORN

Actuaries

INSTRUCTIONS FOR OBTAINING AN ACTUARIAL CERTIFICATE FROM WITHIN THE BGL 360 PLATFORM

If the fund is administered on the BGL360 platform then **follow these easy steps....**

1. Enter the BGL software and complete all end of year transactions for your Fund. Ensure that all Fund details have been entered correctly including all the trustee information and the fund/trustee ABNs
2. Click on the 'Members/Fund Pension Policies' section in the LHS bar. You will see four boxes displayed showing the process. They are...
 - Send data to Actuary
 - Review application
 - Estimated Percentage
 - Actuary Confirmed
3. Read the information in each box and click the button "+ New Actuarial Certificate".
4. Select the name '**G P OSBORN**'.
5. Click 'Next'
6. Complete and review the contact details. If you have any additional comments or any queries, please, click on the 'Optional Details' button.
7. Click 'Next'.
8. Go to 'Confirm Segregation Eligibility' section and confirm if the Fund is eligible to use the segregation method or not.
9. Select 'Submit to Actuary' and your information will be sent directly to **G P OSBORN**. Please note that an estimated actuarial percentage will be calculated automatically.
10. Select 'View Application' and review that the data received by **G P OSBORN** is correct.
11. click on the 'Order button' to request a Certificate.

G P OSBORN will then prepare your Actuarial Certificate and email it back to you within 24 hours together with an invoice.