

ASGARD SIMPLIFIES EOFY WITH NEW ADVISER WEBSITE

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For immediate release:

Today Asgard launched a dedicated end of financial year (EOFY) website for advisers to manage critical dates and timely client communications.

Kelly Power, head of platform product at BT Financial Group said the website was built to provide advisers with comprehensive strategic and functional information to alleviate the administrative burden at this very busy time of year.

“In the tradition of Asgard this site has been developed with vital input from advisers. The net result is an easy to navigate website that provides timely tools and resources,” Ms Power said.

Designed to assist advisers with EOFY processing and reporting the site features:

- an interactive calendar with key cut-off dates for transactions that can be simply loaded in to either Microsoft Outlook or Lotus Notes
- current information regarding key client reports and mailings including pre-paid interest offers, annual pension review letters, S290/personal tax deduction letters, investor reports, tax reports, annual audit reports, annual super pension reports and more
- a library of EOFY documents and guides
- from July advisers will be able to use the tax report look-up tool to find out when client reports have been finalised, posted and to where it has been sent

Advisers can also share the site with other professionals with whom they collaborate, such as accountants.

“The beauty of this website is that it is the first time we’ve been able to give advisers all this information in one place and its available 24/7,” Ms Powers said.

The site went live today.

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www.asgardeofy.com.au

A member of BT Financial Group

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