

## INTEGRATION WITH THE ACCOUNTANTS SCALED ADVICE PLATFORM (A.S.A.P.)

Order a Statement of Advice from A.S.A.P. and pass data seamlessly into your Topdocs order form for SMSF establishment or pension commencement documentation!


When you order a Statement of Advice with A.S.A.P, you will now be able to send data directly to the Topdocs system to order your necessary legal documents as part of the same process.

From within A.S.A.P. you can now order the following documents from Topdocs:

- SMSF Establishment
- Account Based Pension Commencement
- Transition to Retirement Income Stream (TRIS)



Implement your client's advice



If you wish, A.S.A.P. can pass data seamlessly to Topdocs to provide SMSF documentation.

Order SMSF Establishment Document

Order Pension Commencement Document

The A.S.A.P. platform will ask you some simple questions to pre-fill your Topdocs order forms.

### Order Pension Commencement Document

Topdocs are pleased to offer A.S.A.P. users a straight through process to request the documentation you will need to implement this advice. Information below you will be transferred to the Topdocs website to finalise this process.

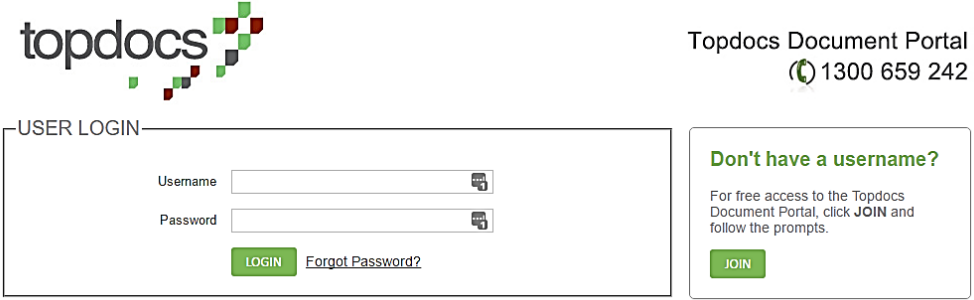
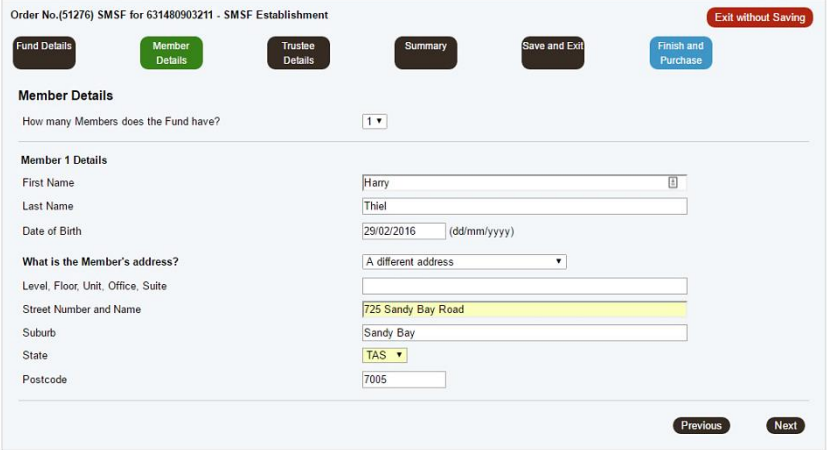
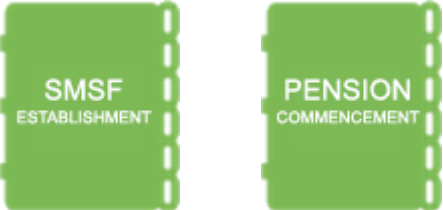
#### Prices

Account Based Pension Commencement	\$165 (Instant email)	\$374 (Full delivery)
Transition to Retirement Income Stream Commencement	\$165 (Instant email)	\$374 (Full delivery)

#### Additional Information

- 1) What type of trustee does the fund have?
- 2) a. How many Individual Trustees does the Fund have?
- b. Is Harvey Thiel a trustee of the fund?
- 3) At what address do the Trustees of the Super Fund meet to sign resolutions?
- 4) What type of pension is the member commencing?

# INTEGRATION WITH THE ACCOUNTANTS SCALED ADVICE PLATFORM (A.S.A.P.)

<p>Log in to your existing Topdocs account (or create a new login)</p>	
<p>Review the Topdocs order form details</p>	
<p>Once you have submitted your order with Topdocs, your SMSF documents will be prepared and either emailed to you instantly, or express posted to you, depending on your selection.</p>	

## QUICK AND EASY PROCESS

By directly integrating, A.S.A.P. and Topdocs make implementing your client's financial advice a rapid and painless exercise. After filling in the additional triage questions you will be sent directly from the A.S.A.P. platform to the relevant Topdocs order form to complete your order. It's that simple!

## NO DOUBLE-HANDLING OF DATA

A.S.A.P. optimises your Topdocs experience by pre-filling relevant data into the application form. This means no double entry of data and the efficient delivery of the advice and implementation process.

## ACCESS A RANGE OF LEGAL DOCUMENTS

A.S.A.P. offers its users direct access to 3 Topdocs order forms: SMSF Establishment, Account Based Pension Commencement and Transition to Retirement Income Stream documents.

## MORE INFORMATION

Should you have any queries or require more information about this great new integration please contact the team at Topdocs on 1300 659 242