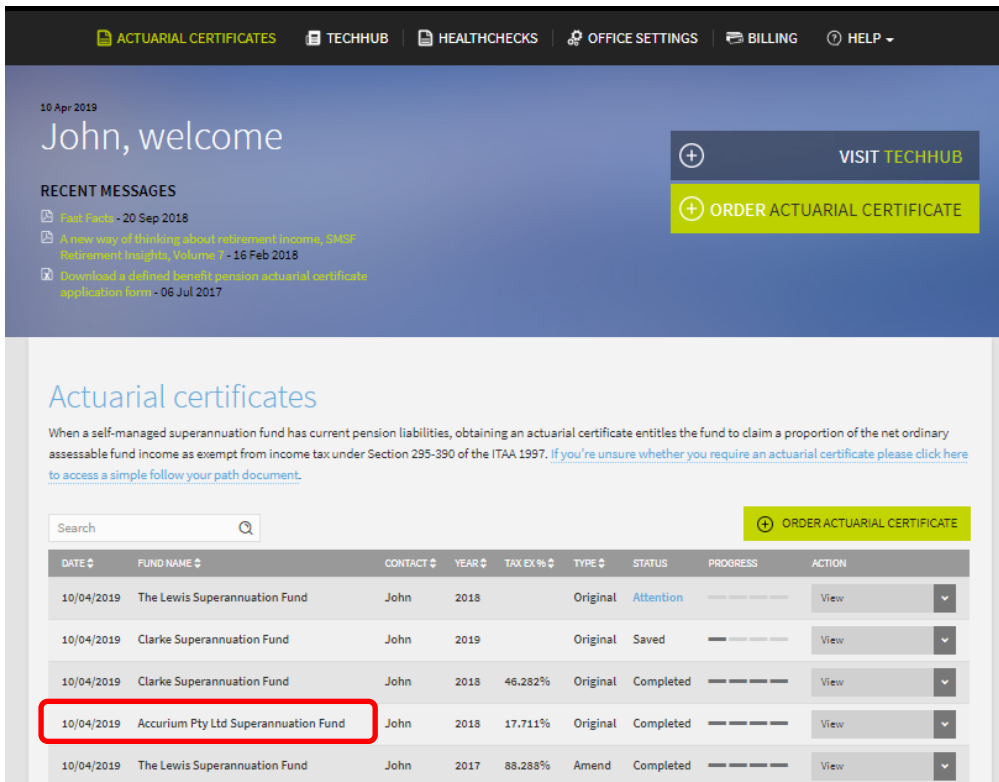


How to do an amendment on the Accurium website

1. Log in to your office and find the completed application on the Actuarial Certificates dashboard you would like to amend.



10 Apr 2019

John, welcome

RECENT MESSAGES

- Fast Facts - 20 Sep 2018
- A new way of thinking about retirement income, SMSF Retirement Insights, Volume 7 - 16 Feb 2018
- Download a defined benefit pension actuarial certificate application form - 06 Jul 2017

ACTUARIAL CERTIFICATES | TECHHUB | HEALTHCHECKS | OFFICE SETTINGS | BILLING | HELP

VISIT TECHHUB

ORDER ACTUARIAL CERTIFICATE

Actuarial certificates

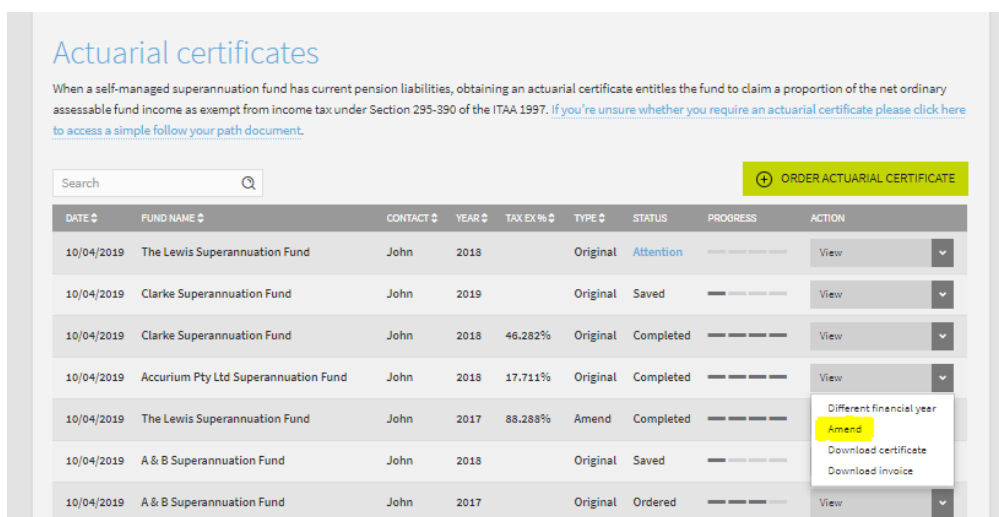
When a self-managed superannuation fund has current pension liabilities, obtaining an actuarial certificate entitles the fund to claim a proportion of the net ordinary assessable fund income as exempt from income tax under Section 295-390 of the ITAA 1997. [If you're unsure whether you require an actuarial certificate please click here to access a simple follow your path document.](#)

Search

ORDER ACTUARIAL CERTIFICATE

DATE	FUND NAME	CONTACT	YEAR	TAX EX %	TYPE	STATUS	PROGRESS	ACTION
10/04/2019	The Lewis Superannuation Fund	John	2018		Original	Attention	-----	View
10/04/2019	Clarke Superannuation Fund	John	2019		Original	Saved	-----	View
10/04/2019	Clarke Superannuation Fund	John	2018	46.282%	Original	Completed	-----	View
10/04/2019	Accurium Pty Ltd Superannuation Fund	John	2018	17.711%	Original	Completed	-----	View
10/04/2019	The Lewis Superannuation Fund	John	2017	88.288%	Amend	Completed	-----	View

2. Under the ACTION column, click on the dropdown list and select 'Amend'. You can also select to amend a completed certificate by clicking on the fund row to view the certificate information and then select the 'Amend' button.



Actuarial certificates

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10/04/2019	A & B Superannuation Fund	John	2018		Original	Saved	-----	View
10/04/2019	A & B Superannuation Fund	John	2017		Original	Ordered	-----	View

Different financial year
Amend
 Download certificate
 Download invoice

You will be taken to Accurium's certificate application form with the original fund information pre-filled.

3. Update the information as required on the application form and then continue through to the payment page.

You will see an Amend option with your original reference number pre-filled. Select the 'Amend Certificate, No Charge' button to submit your application.

The screenshot shows the Accurium web interface for ordering an actuarial certificate. The top navigation bar includes the Accurium logo, the name 'Accurium', and the user name 'JOHN SMITH'. Below this is a secondary navigation bar with links for 'ACTUARIAL CERTIFICATES', 'TECHHUB', 'HEALTHCHECKS', 'OFFICE SETTINGS', 'BILLING', and 'HELP'. The main content area is titled 'Order actuarial certificate' and features a progress bar with steps: INPUT, SEGREGATION, REVIEW, PAYMENT (highlighted), and COMPLETION. A dropdown menu is open for the 'Amend' option, showing a price of '\$0.00'. Below the dropdown, the 'Reference number' is pre-filled with '120923677'. At the bottom of the form, there are two buttons: 'CANCEL AMENDMENT' and 'AMEND CERTIFICATE, NO CHARGE', which is highlighted with a red rectangular box.

4. Our SMSF team will receive and process the application and email you the updated actuarial certificate.