



myprosperity

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Getting Started



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About this Guide

Welcome to myprosperity! We're delighted to have you onboard as a valued client..

You're just a few steps away from setting up your very own personal wealth portal, including 'live' balance sheet, targeted budgeting and cashflow features, cloud document storage, live data feeds and powerful reporting.

This guide will help you to hit the ground running. Rather than a comprehensive overview of everything your wealth portal has to offer, we've focused on the key items you need to get started.

We hope you'll enjoy interacting with your wealth portal and customising it to suit your needs!

"The secret of getting ahead is getting started." *Mark Twain*

Setting up your portal

Inviting in a spouse

myprosperity wealth portal accounts are charged per **household**; that means you can invite a spouse (or children) into your account free of charge.

To invite your spouse, navigate to the **MyTeam** heading of your wealth portal. In here you can define the relationship type, and the level of access you would like to give them into the portal.

The screenshot displays the 'My Team' section of the myprosperity wealth portal. The 'My Team' heading is highlighted in green. Below it, the 'Personal' section is visible, showing family members (spouse, child, etc.) with a '+Add' button. Two family members are listed: Eloise Johnston (Wife) and Jeremy Johnston (Owner). The 'Add a family member' form is overlaid on the right side of the screen, showing fields for Member name, Allow guest access, Email, and Date of birth. A table of permissions is also visible, with columns for 'View' and 'Modify'. The 'Add' button is highlighted with a red box.

Once your spouse details are added to the account your spouse will receive an email inviting them to set up an account with access to your portal.

Tip: You can add entities such as trusts, companies or self-managed-super funds in the MyTeam area. Once added, you can allocate %-ownership across your assets & liabilities (refer next section). You can also invite your professional advisers to your wealth portal via the MyTeam area and allocate permission settings.


Adding assets - property & motor vehicles

In this section we are going to explore entering a property and a car into your wealth portal. Under the **mywealth** heading select **+Add**. Once the popup screen appears hit the **Home** icon.

Our platform integrates with **RP data** to pull the latest property valuation reports. Simply type the address into the text box, specify the usage type and hit **Continue**

Add an asset

Create to-do

 **59 Derby Street**
Balmoral, QLD, 4171

\$1,518,810 Edit

Median suburb house price: \$650,000

RP Data Price Range \$1,275,801 - \$1,761,820

* The estimated property value of \$1,518,810 is based on various factors such as recent sales history and the median price of the properties in Balmoral.

Not your property?
add manually

Back Continue

On the next screen it will pull through the data collected from RP Data, a thing to note, you can manually update the price by hitting the edit button. For instance, if a client renovated the property and believes the value has increased - you can adjust the figure as required. The property value will increase/decrease based on the suburb performance even if you have manually adjusted the figures..

If a property cannot be found, you manually need to add the property to the platform.

Once the asset is added to the platform you will be able to pull insights under the **details** tab of the assets.

Under the **details** tab you may choose to allocate ownership percentages to a spouse or other entity by hitting the edit button and changing the owner percentages field.

Owners



Dwayne The Rock Johnson (100.00%)

Edit

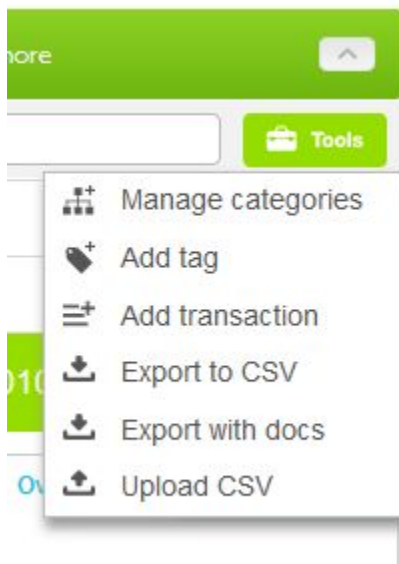
The process for adding a vehicle is similar, after hitting **Add** from the **mywealth** tab, select the motor vehicle icon and define the **make > Model > Year > Variant**. You may like to adjust the value by hitting the **Edit** button. A thing to note, at this point in time you cannot value a Motorcycle from within Myprosperity.

Adding assets - setting up account/investment feeds

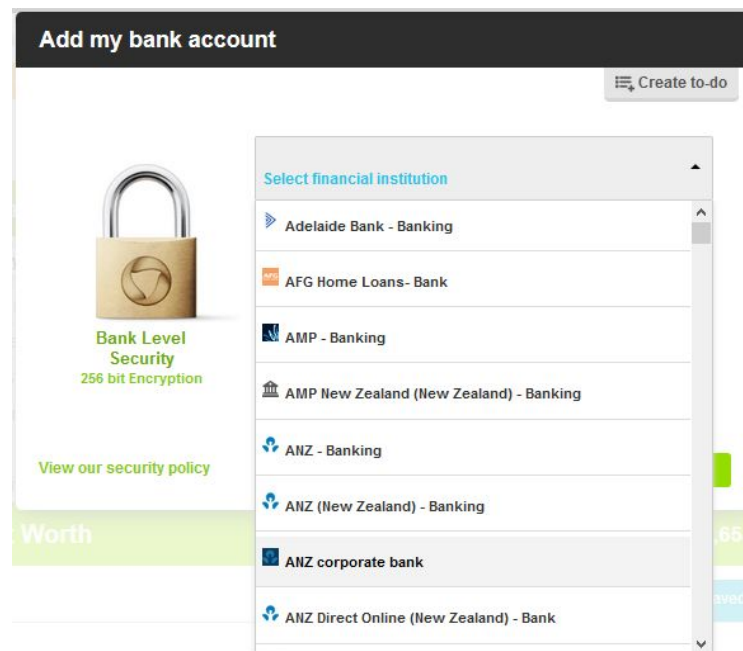
To add in account/investment feeds, navigate to the **mywealth** tab and hit **add**. We will start by adding a **bank account**. From here you will need to **Select financial institution**. You can then enter your internet banking **username & password**.

Feeds can also be enabled for the following:

- Credit cards
- Bank Accounts
- Home/Personal/Investment Loans
- Term deposits
- Superfunds
- Investment Portfolios



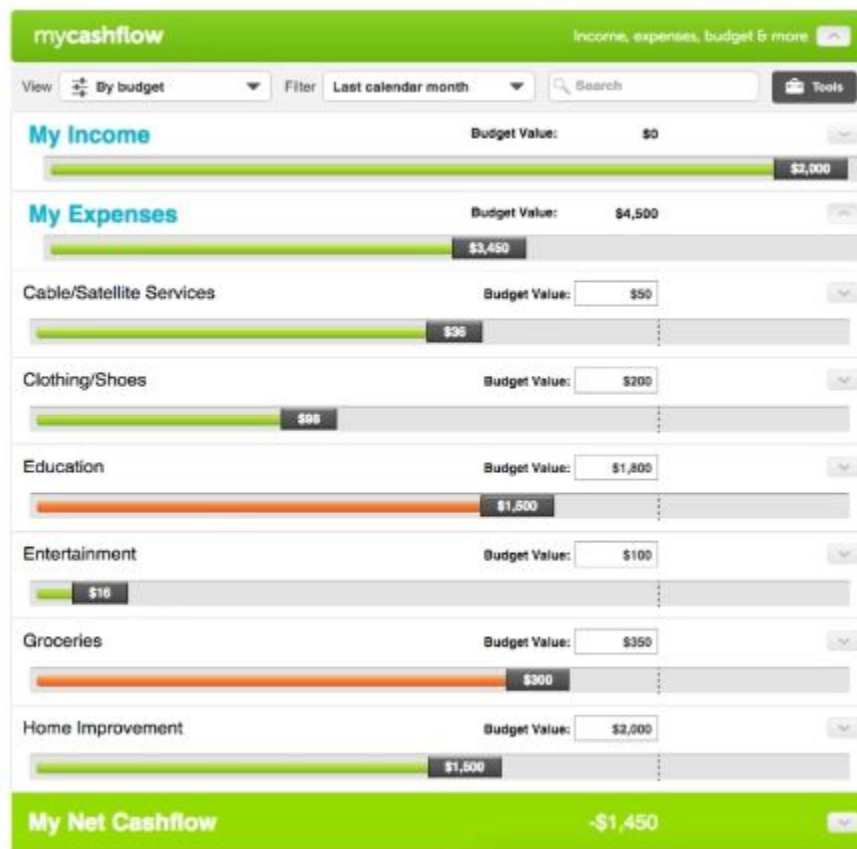
by



Note: Your important information is safe with myprosperity. We use the same 128-bit encryption and physical security that banks use to protect your private details and our practises are monitored and verified Verisign and supported by McAfee Security.

Once you have entered this information the sync will begin in the background. A thing to note, feeds will only pull through the last 3 months of transactions.

If you require additional months you will manually need to upload a CSV into the system. To upload CSV statements into myprosperity navigate to the **mycashflow** tab and hit **tools > upload CSV** and follow the steps to upload.



Setting a budget

Once your transactions have synced from your bank accounts, setting a budget is simple. In the wealth portal navigate to the **mycashflow** tab, in the view dropdown list select **By budget**, filter by period if required and allow time for the view to update.

You will now be able to see your budgets based on the different [income and expense categories](#), and amend the **Budget Value** field for each individual category.

Setting a goal

To set a goal, navigate to **mygoals** and hit the **add** button.

We are going to look at setting a simple savings goal from the **Goal type** drop down, then hit **next**.

Give the goal a name, set value to the goal and **link it to an account**.

From here establish a variable term that fits your budget and hit **Save**.

That's it! You're done. The software will now track the goal against the savings account and keep you on track with automated email notifications.

Disneyland

Goal amount

\$50,000

Link to bank account

My Transaction Account (xx3xxx) (\$35,642.11) ▾

No bank account

My Transaction Account (xx3xxx) (\$35,642.11)

Date	Planned Amount
01 Jan 2018	\$35,000
01 Apr 2018	\$39,000
01 Jul 2018	\$43,000
01 Oct 2018	\$50,000

● Planned

Savings term (months)

12

Regular deposit

\$1,038.36

Week
 Fortnight
 Month
 Advanced

Cancel Save

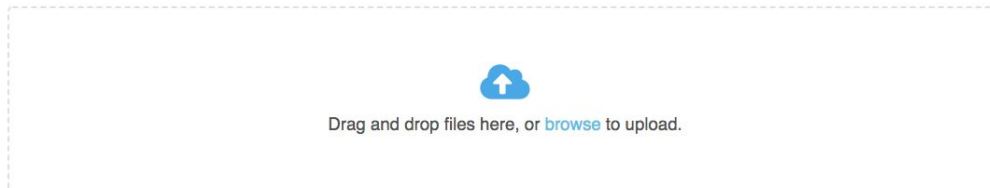
Upload a will/insurance policy

To upload a Will or insurance policy, navigate to **myprotection**. Let's add a will. Click **"My Wills"** then **"My Will"**. From here you can **"Edit Details"** and upload a copy of your Will (and related Estate documents, e.g. Power of Attorney) in the **"Documents"** tab.

The screenshot shows the 'myprotection' web interface. At the top, there's a green header with 'myprotection' and 'Insurance & wills'. Below the header, there's a navigation bar with 'Filter', 'Generate my will', and 'Add Insurance' buttons. The main content area is titled 'My Insurance' and 'My Wills'. Under 'My Wills', there's a sub-section for 'My Will'. The 'My Will' card shows a document icon, the title 'My Will', the document date '16/09/2018', the owner 'Georgia Aaron', and the last updated date '16/09/2018'. There are three action buttons: 'Create to-do', 'Update generated will', and 'Get executor kit'. Below the card, there are four tabs: 'Details', 'To-dos', 'Documents', and 'Advanced'. The 'Details' tab is active, showing a list of fields: 'Last Updated' (16/09/2018 9:13:29 PM), 'Document Date' (16/09/2018), 'Name' (My Will), 'Owners' (Georgia Aaron (100.00%)), 'Location of original documents', 'Firm', 'Contact', 'Address', 'Email', 'Telephone' (Home: Work: Mobile:), 'Reference Note', 'Signed Will', 'Funeral Notes', and 'Special Wishes'. There is a trash icon and an 'Edit Details' button at the bottom right of the details section.

Tip: Once you have loaded your Will and related information, you will have the peace of mind that at any time your spouse (or permitted advisers) can generate an **Executor Kit** that provides up-to-date details of your financial position, key advisers, funeral wishes and other important information.. Have a go at launching your Executor Kit now by clicking **"Get executor kit"**.

My docs



All files		Folders	Start typing to search	
Actions Move Download Delete				
<input type="checkbox"/>	File name	Date uploaded	Location	
<input type="checkbox"/>	SMSF Deed.pdf	16/09/2018	Zorro SMSF	
<input type="checkbox"/>	Family Trust Deed.pdf	16/09/2018	Zorro Family Trust	
<input type="checkbox"/>	Family Trust Deed.pdf	16/09/2018	El Jefe Family Trust	
<input type="checkbox"/>	OSA - logenta.pdf	04/09/2018	My Advice	
<input type="checkbox"/>	FSG.pdf	01/09/2018	My Advice	
<input type="checkbox"/>	OSA - logenta.pdf	30/08/2018	My Advice	
<input type="checkbox"/>	Section 32 - 19 Wonderland.pdf	22/08/2018	19 Wonderland Avenue, Tamar...	
<input type="checkbox"/>	Contract of Sale - 19 Wonderland.pdf	22/08/2018	19 Wonderland Avenue, Tamar...	
<input type="checkbox"/>	Section 32 - 13 Henry.pdf	22/08/2018	13 Henry Street, Hawthorn, VIC...	
<input type="checkbox"/>	Contract of Sale - 13 Henry.pdf	22/08/2018	13 Henry Street, Hawthorn, VIC...	

Upload a document

The personal wealth portal gives you the ability to upload financial documents far beyond a will or insurance policy.

Documents can be updated in bulk, organised in folders, searched and retrieved whenever you require and from any device.

Upload items such as:

- Financial Statements & Tax Returns
- ASIC documents
- Group Certificates
- Income Documents
- Expense documents
- Statements of Advice
- Service Agreements
- Property related documents
- Etc.

FAQ's, support and how-to guides

We have only scratched the surface of the many value-adding features of your personal wealth portal. Please navigate to our client support desk to learn more.

Client Support Desk - <http://support.myprosperity.com.au/>

Contact us

Connect with our next level support team directly at support@myprosperity.com.au

“Financial freedom is available to those who learn about it and work for it.” - Robert Kiyosaki