

Getting started



Welcome to your personal wealth portal, where you can manage all of your finances in one place, anywhere, any time.

1

Activate your account

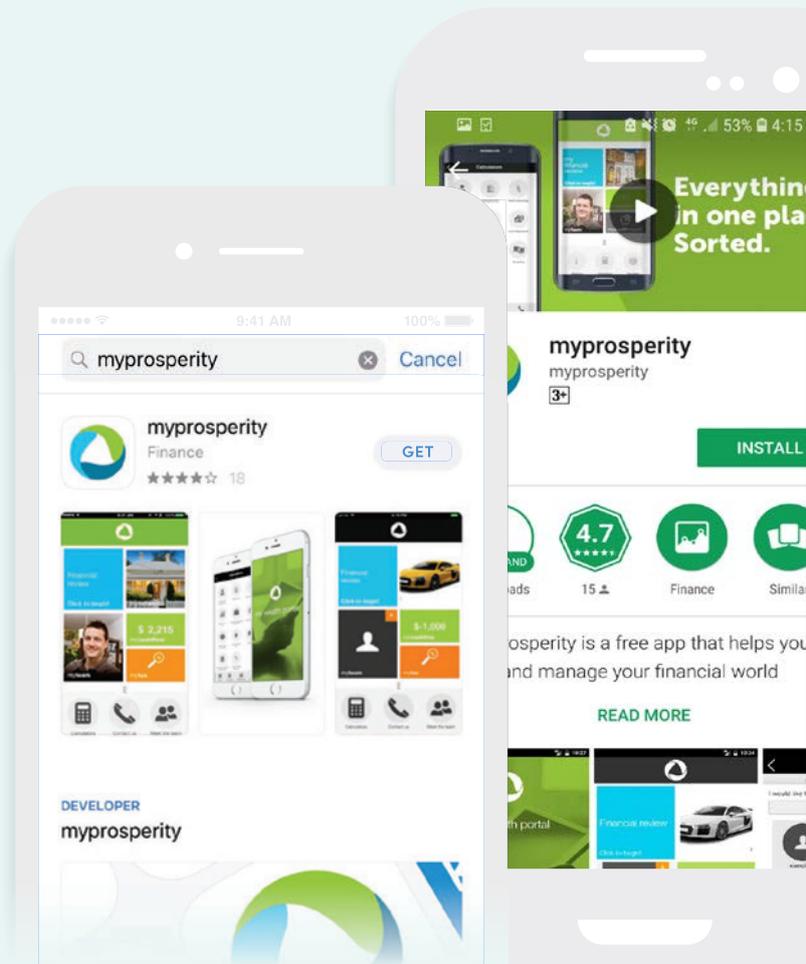
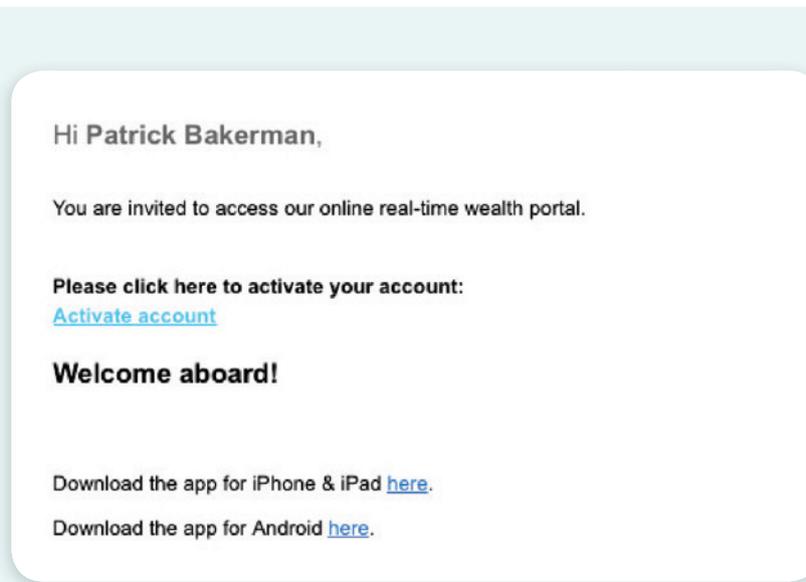
Follow the instructions outlined in the activation email to set your password and access your personal wealth portal.

2

Download the app

Navigate to the app store on your mobile device, then download and install the myprosperity app. Once installed, log in to the app.

Note: The first time you access the app you may be asked a series of survey questions to help with benchmarking and for your adviser's records.



3

Add in your home & vehicle

Start by adding in your home and car. In the app, click on the my**networth** tile then hit the + in the top right corner.

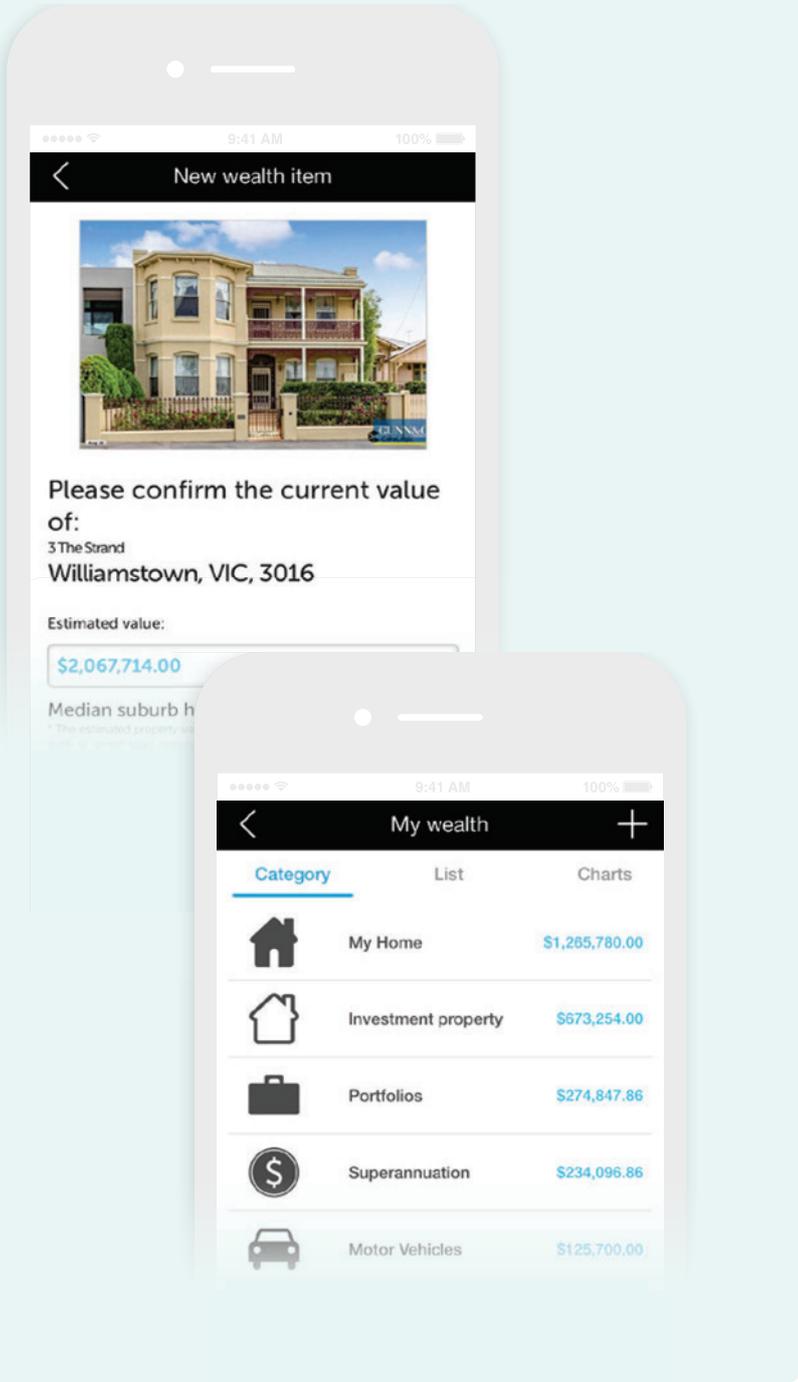
TIP: Take photos of your personal assets and store them in your wealth portal so that if you need to make a claim, you'll have everything you need in one place.

4

Build your personal balance sheet

Add in your personal assets and liabilities (super, investment portfolio, loans, home & contents, lifestyle properties, etc.)

TIP: You can modify the categories and regroup transactions to fit your lifestyle. You can also create tags to highlight deductions and other tax related transactions so you can save hours at tax time.



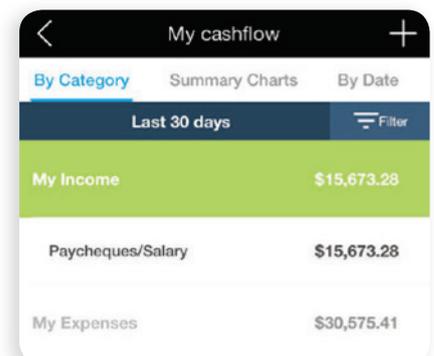
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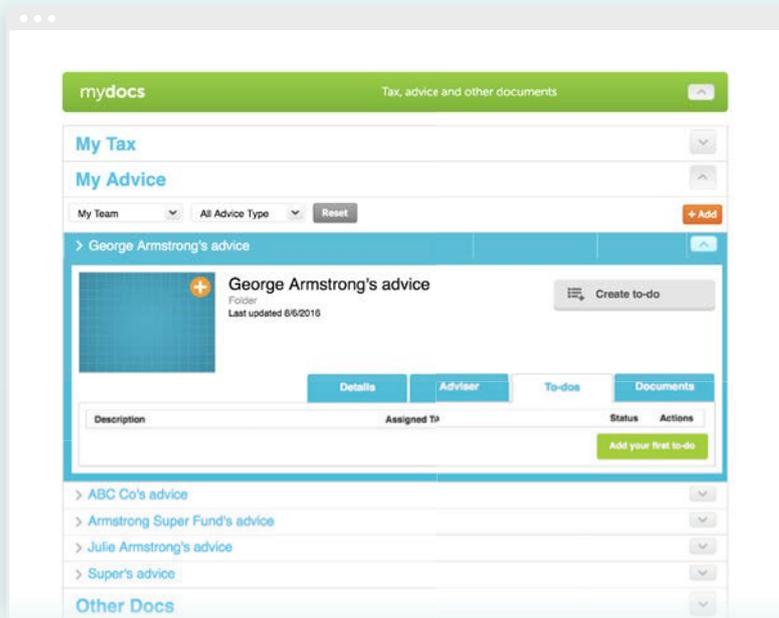
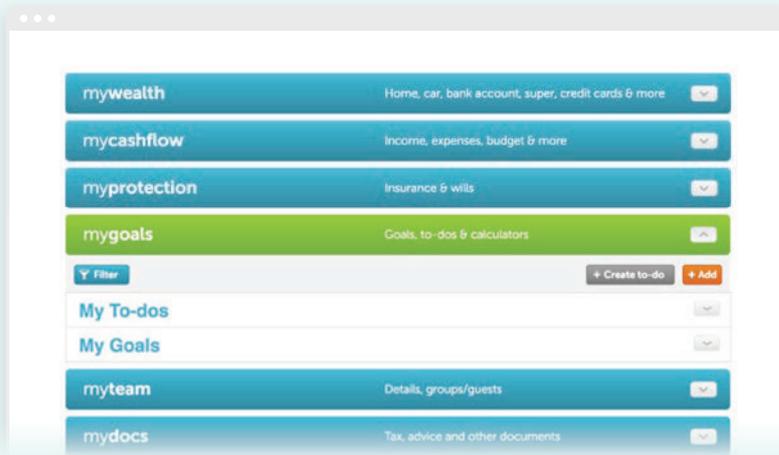
Track your cashflow

If you haven't already, link your bank accounts. You can do so via the my**cashflow** tile or the my**networth** tile.

Once your bank accounts have been linked, you'll get a consolidated view of your cashflow across multiple banks.

Your wealth portal automatically groups and categorises transactions so you can see exactly where your money is going.





6

Explore the wealth portal on a computer

For additional features, log in to your wealth portal on a computer! You'll have access to all the features listed on the mobile app - and more.

- Add your spouse and professional network via **myteam**.
- Upload and store your important documents such as your insurance policies and wills under the **myprotection** tab.
- Set goals to better manage debt or save for that investment property in the **mygoals** area.

Congratulations, you're one step closer to understanding your financial position and ultimately achieving financial freedom!

Learn more about your personal wealth portal at <http://support.myprosperity.com.au/>