Introducing...
our secure client portal

We are pleased to introduce our client portal which enables us to collaborate efficiently and securely with you.

As cyber threats, such as email phishing and scams continue to grow at an unprecedented pace, it has been a major focal point within the financial industry to set high standards around protecting clients' sensitive information.

Which is why we have taken this seriously and committed to finding a secure solution for managing your financial data.

About our Portal

Our secure portal offers an easy way for you to securely store, communicate, and collaborate with us on all your financial needs.

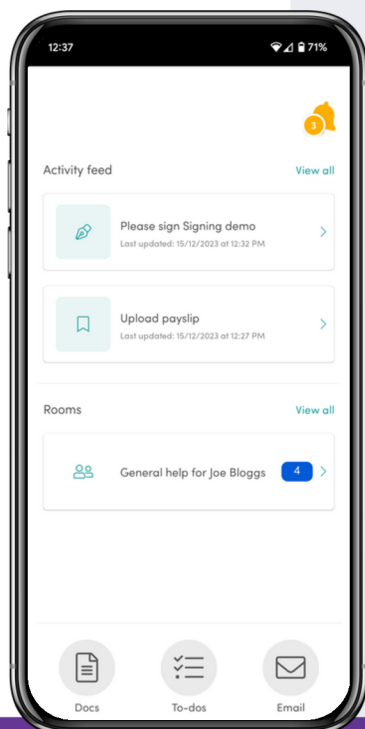You, as our valued client, will benefit from:

Bank level security: Our portal uses the same 256-bit encryption that banks use to protect your private details.

Digital document storage and signing. No printing, emailing or mailing required.

Everything in one place: stored securely in the cloud and easily accessible from your computer or mobile at any time.

FAQs

When will I start using the portal? Prior to our next meeting, you will be emailed a link to register and set up your myprosperity account. However, if you don't feel comfortable doing this, we can help you set it up during your meeting.

What will the Secure Portal be used for?
- Document management – we can share documents with you (ie. Statements), you can share documents with us (ie. Tax returns) and you can also store sensitive documents within your secure portal (ie. Will, Enduring Power of Attorney)
- eSignatures – you can digitally sign documents within the portal and app.
- Task requests – action upcoming or outstanding items when prompted with a "to-do" request
- Digital forms – complete easy-to-use digital forms so we can be well prepared when you chat with our team.

Who provides the client portal? The portal is powered by myprosperity.

How do I access my Secure Portal? Once your account is set up, there are two ways to access your Secure Portal:

1. Website: https://myprosperity.com.au click Login
2. Mobile App: download the myprosperity app on your device. See below for more details.

Will I still get emails from you with attachments?
Once your portal has been activated, we will no longer be emailing sensitive information (*such as statements or forms*) via attachments, as this form of communication carries a high level of cyber threat risk.

Can I get assistance setting it up?
Most certainly! Depending on your preference, we can help you over the phone step-by-step, or alternatively, you can pop into the office anytime and one of our team members will assist you. We're here to make this transition as easy as possible for you.

Other questions? Contact us

How to activate your account

1. You will have received an email from us but with an email address of no-reply@myprosperity.com.au.

2. Click the link in the email.

3. Activate your account by completing your details, creating a password and accepting the terms and conditions.

4. Click Activate account.

5. Once activated, you will be prompted to log back in and set up your Multi-factor authentication which can be SMS, Authenticator app or other biometrics

Important notes:

- If you activate your account on your mobile device, it will prompt you to download the app.
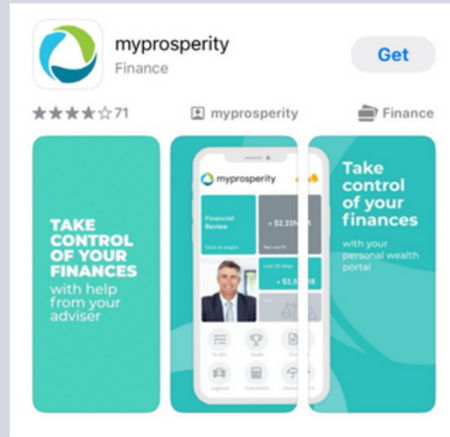- All your Secure Portal emails will be from (no-reply@myprosperity.com.au).

How to get the myprosperity app

1. Depending on your device, either download it from the App Store or Google Play

2. Search "myprosperity"

3. Download