



Your quick resource guide to...

# Getting Connected

Setting up your partner  
portal for success





# Getting Connected

## Your quick reference guide

Thank you for attending the **Getting Connected** webinar.  
A full version of the webinar is available below for you to rewatch at anytime.

In addition to the full video, this post-webinar pack is filled with short videos and guides for all relevant topics, to enable you to setup your Partner Portal. Click the topic below or continue through to find what you need.

- Admin settings
- Configuring your portal
- Viewing and adding clients
- Support and resources
- Next steps



**Watch the full webinar**

# myprosperity onboarding training

## Getting Started

Learn the essentials of adding clients, managing tasks, sharing documents, and requesting eSignatures in myprosperity.

[Register now](#)

## Xplan

How to utilise myprosperity's integration with Xplan

## Ongoing Support

Visit [myprosperity.com.au/resources](https://myprosperity.com.au/resources) or email [support@myprosperity.com.au](mailto:support@myprosperity.com.au)



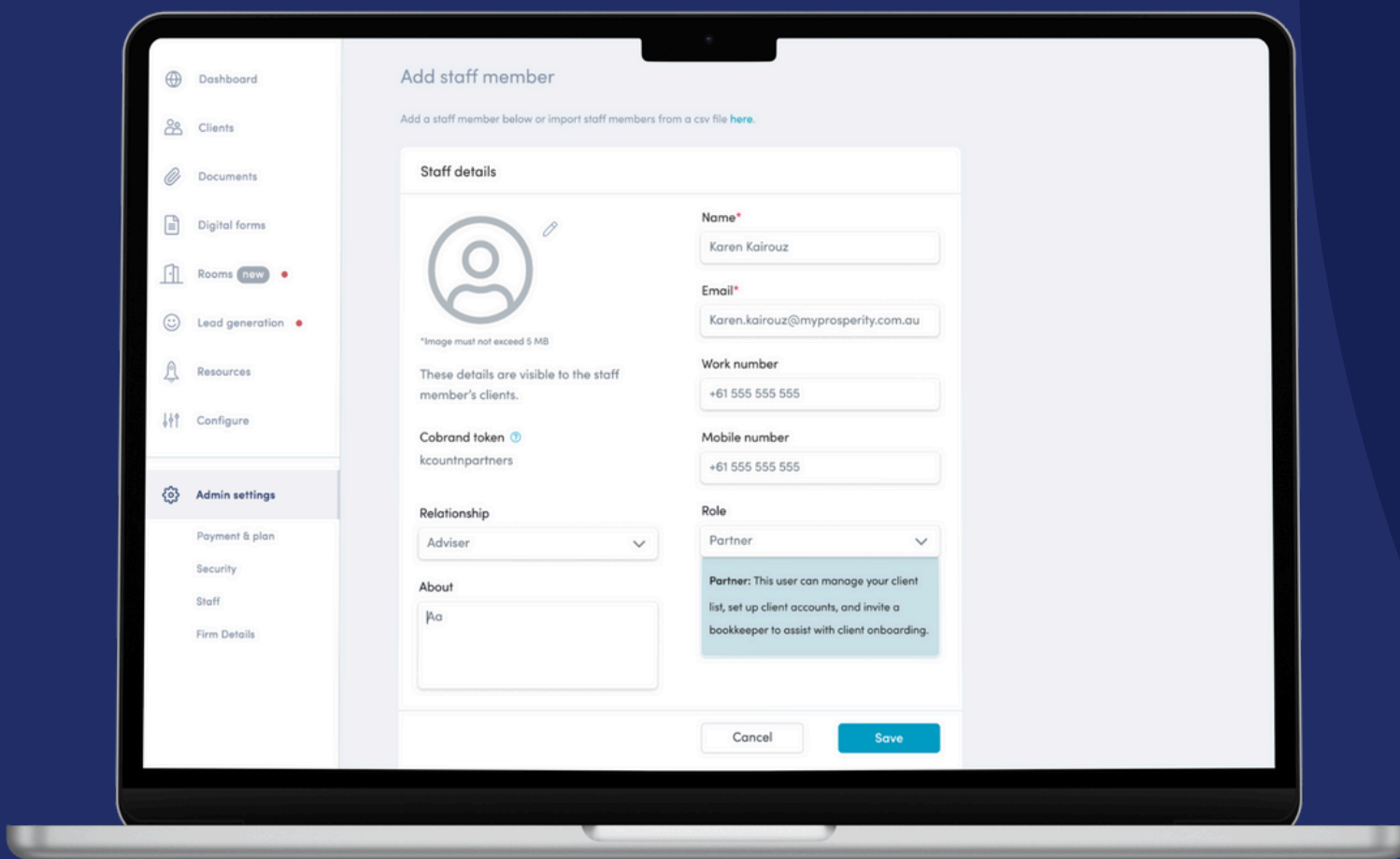
# Admin settings

## → Staff roles

Learn how to add staff, assign roles and permissions, and manage access to client files through the video or guide below.

Watch video

View guides

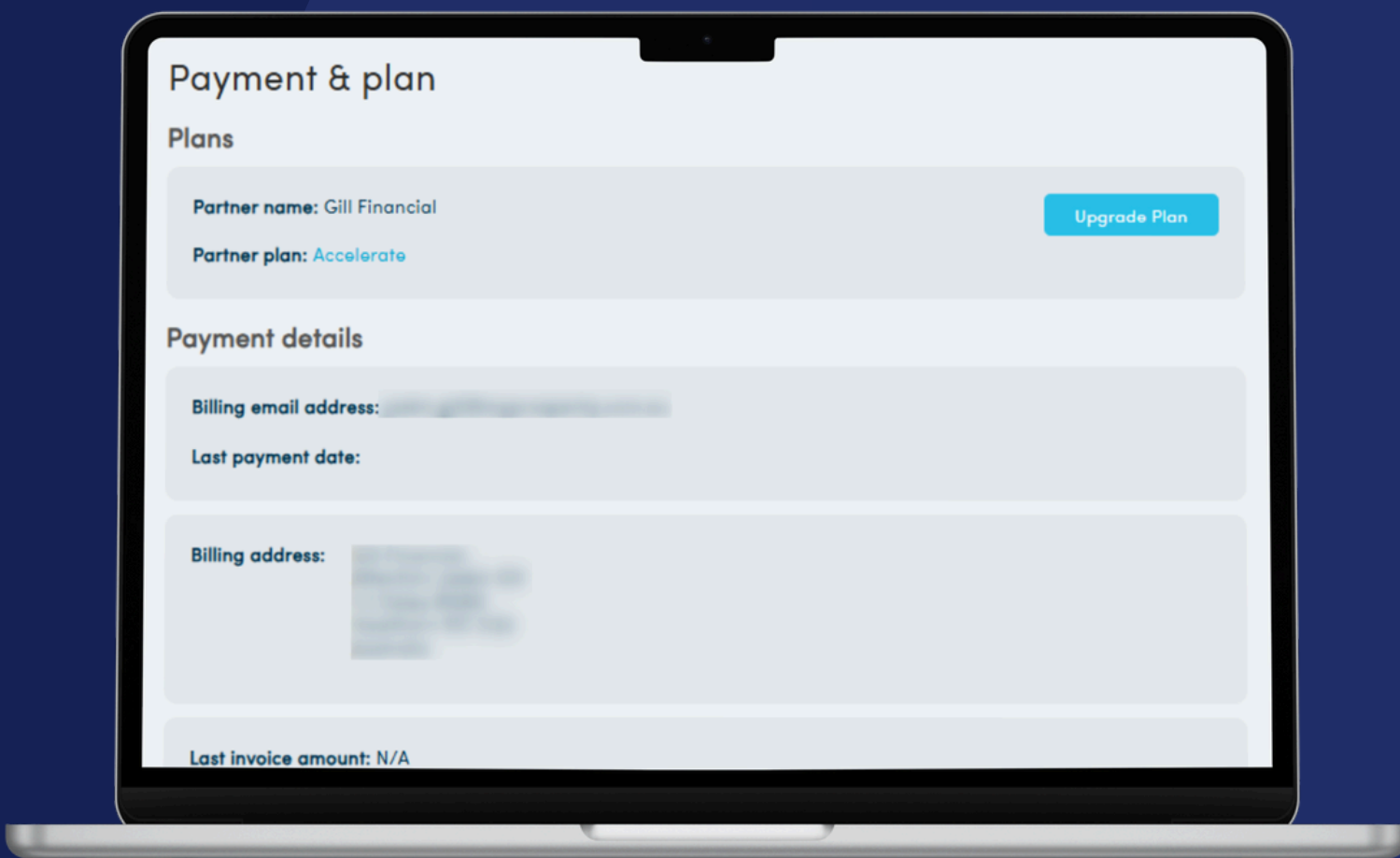


## → Billing, payments & firm details

Discover where to view invoices, update billing details, and manage your firm's contact information with the video and guide below.

Watch video

View guides





# Configuring

## → Services

Set up and customise the list of services your firm offers to improve visibility for clients and generate new enquiries through the portal.

[Watch video](#)[View guide](#)

## → Mobile app setup

Configure client portal views and customise widgets to tailor the mobile app experience to different client needs.

[Watch video](#)[View guide](#)

## → Integrations

Learn how to connect third-party tools like Xplan, FYI, SharePoint, and e-signature platforms for a more seamless workflow.

[Watch video](#)[View guides](#)



# Adding clients

Via integrations, individually or in bulk

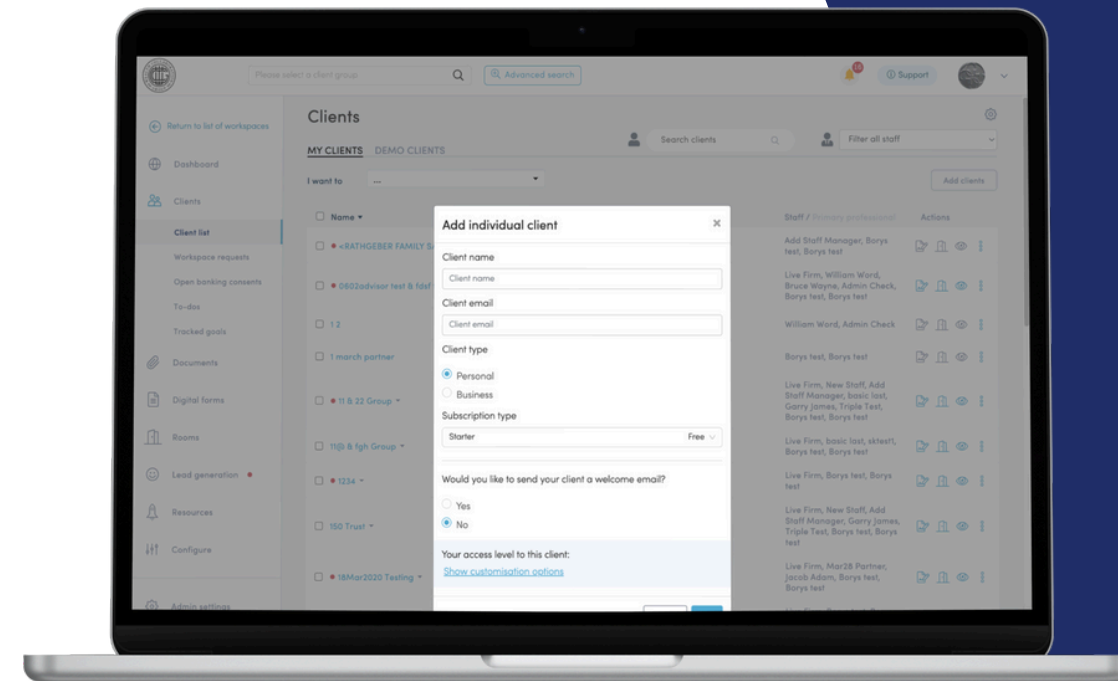


## Adding a new client (manual)

Manually create individual, group, or entity client profiles, choose account type, and send invitations or digital forms during setup.

[View guide](#)

[Watch video](#)

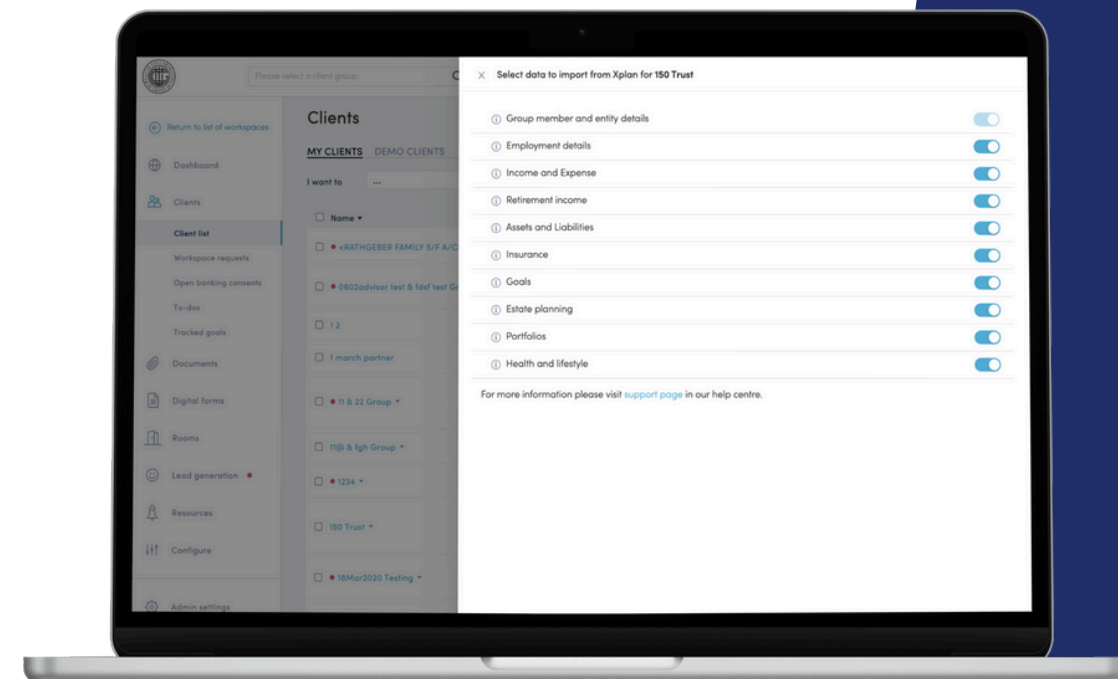


## Adding clients via integration

Import multiple clients at once from connected platforms like Xplan, APS, or FYI, streamlining onboarding while maintaining control over invitations.

[View guide](#)

[Watch video](#)





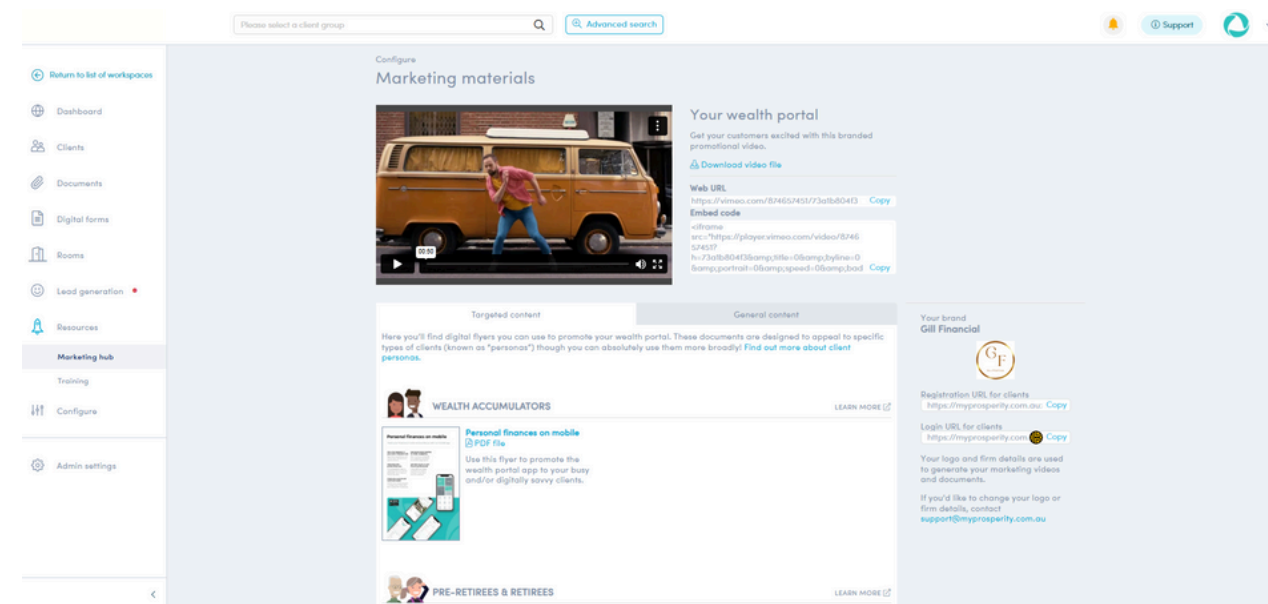
# Resources for change management

Effective change management helps clients understand the benefits of myprosperity. We've developed a range of flyers and email templates for you to use with your clients.

## Branded resources

In the **Marketing Hub** you'll find resources to share with your clients in your own business branding.

Watch the video or view the guide below to see where you can find these resources.



View guide

Watch video

## Other resources

Through our **Partner help centre** you'll find a range of content including the key change management flyers and templates below.



View resources

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[View resources](#)

### Introducing digital document signing

Go paperless with digital document signing

Digital signatures are a quick, easy and secure way to sign important documents. It's easy - here's how

#### No more paper trails

Cut down time spent on paperwork. Read, sign and return documents in just a few minutes, with a click of your mouse or a tap of your finger.

#### Never miss a deadline

Get notified via the app every time a document needs to be signed. No app? No problem: you'll also receive email reminders.

#### Sign documents on the go

Log in to your portal on desktop, mobile, or tablet to sign documents like tax returns, statements of advice, and review summaries.

#### Everything in one place

Once signed, your documents are automatically stored in the Docs area of your portal for easy access when you need them.

Digital document signing - just one of the many ways your portal helps you organise, analyse, and collaborate so you can reach your financial goals.



### 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

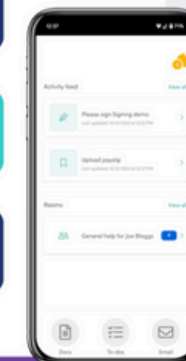
Our secure portal offers an easy way for you to securely store, communicate, and collaborate with us on all your financial needs.

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?**  
When you log in to your myprosperity account, you will be prompted to set up your myprosperity account. This process is quick and easy, and you can complete it during your meeting.

#### What will the Secure Client Portal offer?

- Document management - you can share documents with your adviser and they can also store sensitive documents in the portal (ie. Will, Power of Attorney)
- eSignatures - you can sign documents within the portal and your adviser can sign on their behalf
- Task requests - you can request your adviser to complete tasks when prompted
- Digital forms - you can complete forms online so we can be well prepared for your meeting

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

**How do I access my Secure Client Portal?**  
The client portal is set up, there is no need to download an app.

1. Website: <https://myprosperity.com.au>
2. Mobile App: download the app from the App Store or Google Play Store.

#### Will I still get email attachments?

Once your portal is set up, you will no longer be emailed attachments, as this poses a communication threat risk.

#### Can I get assistance?

Most certainly! If you have any questions, please contact your adviser. We can provide step-by-step guidance, or you can contact our support team. Our members will assist you in making this transition.

#### Other questions?

### Your portal's security features

Know with confidence your information is safe

#### Bank level security

Your portal uses the same 256-bit encryption that banks use to protect your private details. And like banks, it has a layered security infrastructure with "checkpoints" throughout to minimise risks.

#### Your money is untouchable

As a read-only service designed to help you organise and analyse your finances, your wealth portal cannot be used to move or modify funds.

#### Industry-leading providers

From document management to live data, your portal features services from industry-leading platforms like Amazon Web Services, Yodlee, and OneSpan for a robust, reliable, and secure experience.

#### Multi-factor authentication

Make your portal even more secure by enabling multi-factor authentication. This introduces additional steps to log in so no-one else can access your account.





# Next steps



Getting your staff trained

[Book Training](#)



Think about your client approach



Incorporating myprosperity into your business



Start your rollout



# Further support

You'll find the resources referenced throughout this guide and many more by visiting our [Partner help centre](#).

For any other questions, contact our expert support team **[support@myprosperity.com](mailto:support@myprosperity.com)**.

**Partner help centre**

**Email support**

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