myprosperity

Partner Portal implementation checklist

Financial professionals

Use this checklist and the resources linked to keep on track with your myprosperity Partner Portal implementation plan.

Training

- [ ] Complete self-paced learning
- [ ] Review and sign off implementation plan

Early usage

- [ ] Onboard your first client
  View guide
- [ ] Onboard 5 clients within the first 30 days
- [ ] Send digital forms to clients
  View guide
- [ ] Upload and share documents
  View guide
- [ ] Complete eSignature request on platform
  View guide
- [ ] Create and assign a task to a client
  View guide



Need more resources?

Access all guides, training videos, webinars and more through our **Partner Help Centre**

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