Automate follow-ups. Free your team.

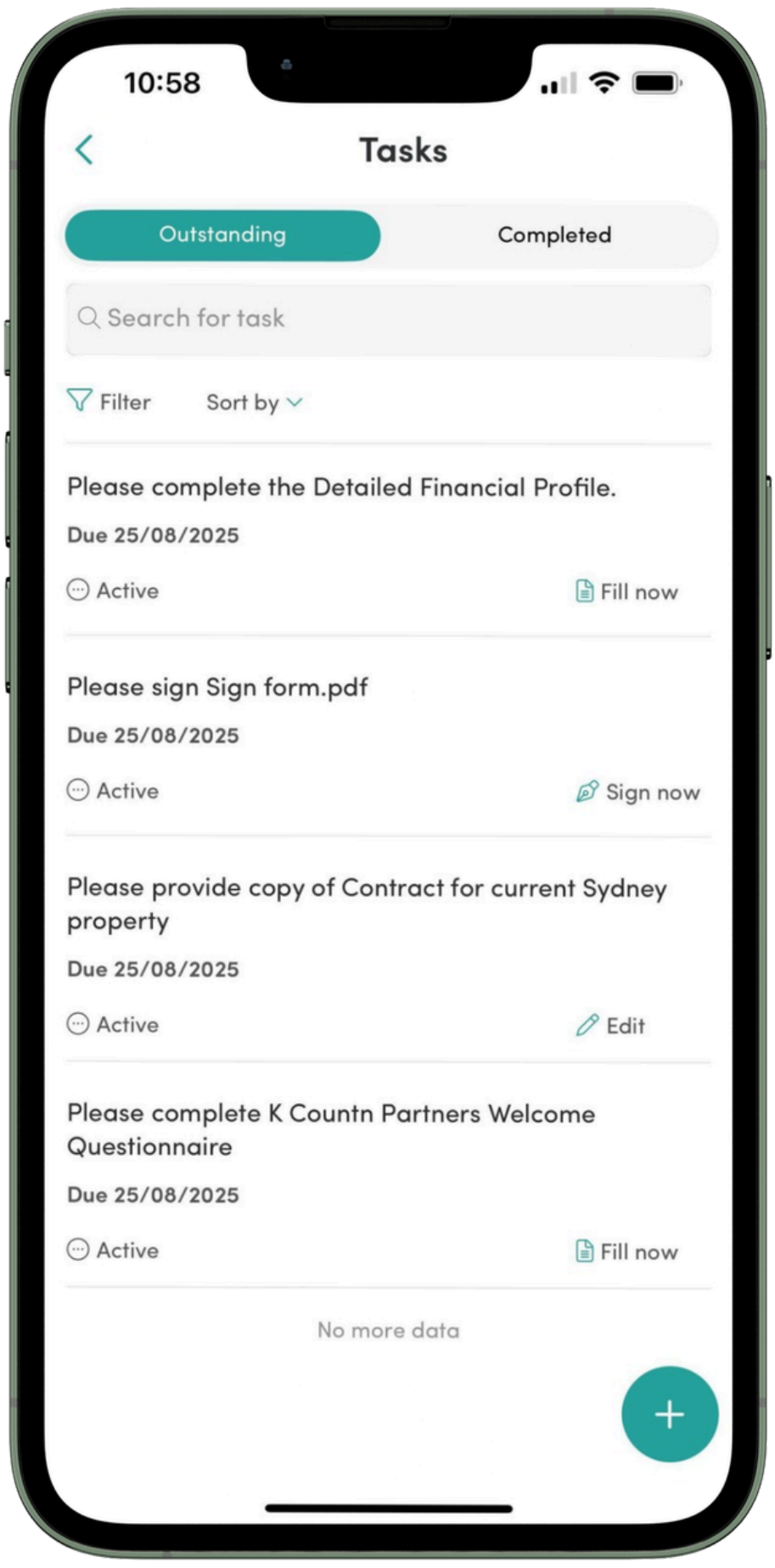
Smart task tracking and reminders

Keep client actions, documents and requests moving with automated reminders and built-in task tracking. myprosperity To-dos helps keep everything organised in one place, making it easier to assign tasks, track progress and stay on top of important actions.

Stay on track with shared tasks and reminders.

With To-dos, you can:

- Create and assign tasks to clients, staff and third parties
- Automate reminders to reduce manual follow-up
- Track progress from a central dashboard
- Keep documents, forms and actions connected in one workflow



What this means for your practice

Less chasing, more automation
Reduce manual follow-up with automated reminders.

Better visibility
See outstanding actions and client progress in one place.

Stronger client engagement
Keep clients informed and involved between meetings.

Getting started with To-dos

Create customised To-Do templates for common client requests and workflows, then assign and track actions from one central location.

Learn: How do I add a To-do in the Partner Portal?

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