myprosperity

Onboarding in Rooms

PROCESS MAP

Initial contact

Let your client know that you will be completing their onboarding in Rooms.

Open a Room

You can use a Rooms template of your own or create a new one.

Add:
1. Welcome pack
2. Brief financial profile
3. Financial Services Guide

Invite your client

Invite your client/s to the myprosperity Portal and the Room and send a notification to "notify members".

Client accepts invite and opens Room

Send documents

Send a welcome message and ask your client to review/sign the Welcome Pack and Financial Services Guide and complete their Brief Financial Profile.

Client reviews/signs documents

Review documents

myprosperity notifies you when a client has completed their Digital Form. Now you can review their Brief Financial Profile.

Request any clarification that is needed quickly using the **@mention** function in Rooms chat.

To request additional information and documents, create a To-Do in the Room with email reminders.

Meet with client

Meet with your client and provide recommendations to proceed.

Disengage

Detailed Fact Find

Complete a Detailed Fact Find with your client in their onboarding meeting.

OR

Upload a Detailed Digital Fact Find via Digital Forms in Rooms and assign to your client.

Client completes Detailed Fact Find

Final recommendations

Provide final recommendations before confirming engagement.

Disengage

Confirm engagement

Upload your Authority to Proceed and Engagement Letter to the Room and request E-signatures from the client.

Client signs documents

Statement of Advice

Prepare your SOA, upload it to the Room and request an E-signature from the client.

Client signs SOA

Create additional Rooms for advice objectives

Open individual Rooms for each relevant objective and invite your client.

E.g.
- Insurance review Room
- Will preparation Room
- Finance broking Room
- Portfolio review Room

Upload bill

Upload the bill/annual account to the Room.

Client pays bill

Close Room

All done! You can now close the Onboarding Room.