

Getting started



Welcome to your personal wealth portal, where you can manage all of your finances in one place, anywhere, any time.

1

Setup account

Your adviser should have sent an invitation to your preferred email address. Once you've located the email, select the activation link. You will then be asked to create a password.

*Please note: if you can't find the email don't forget to check your junk mail / spam folders.

2

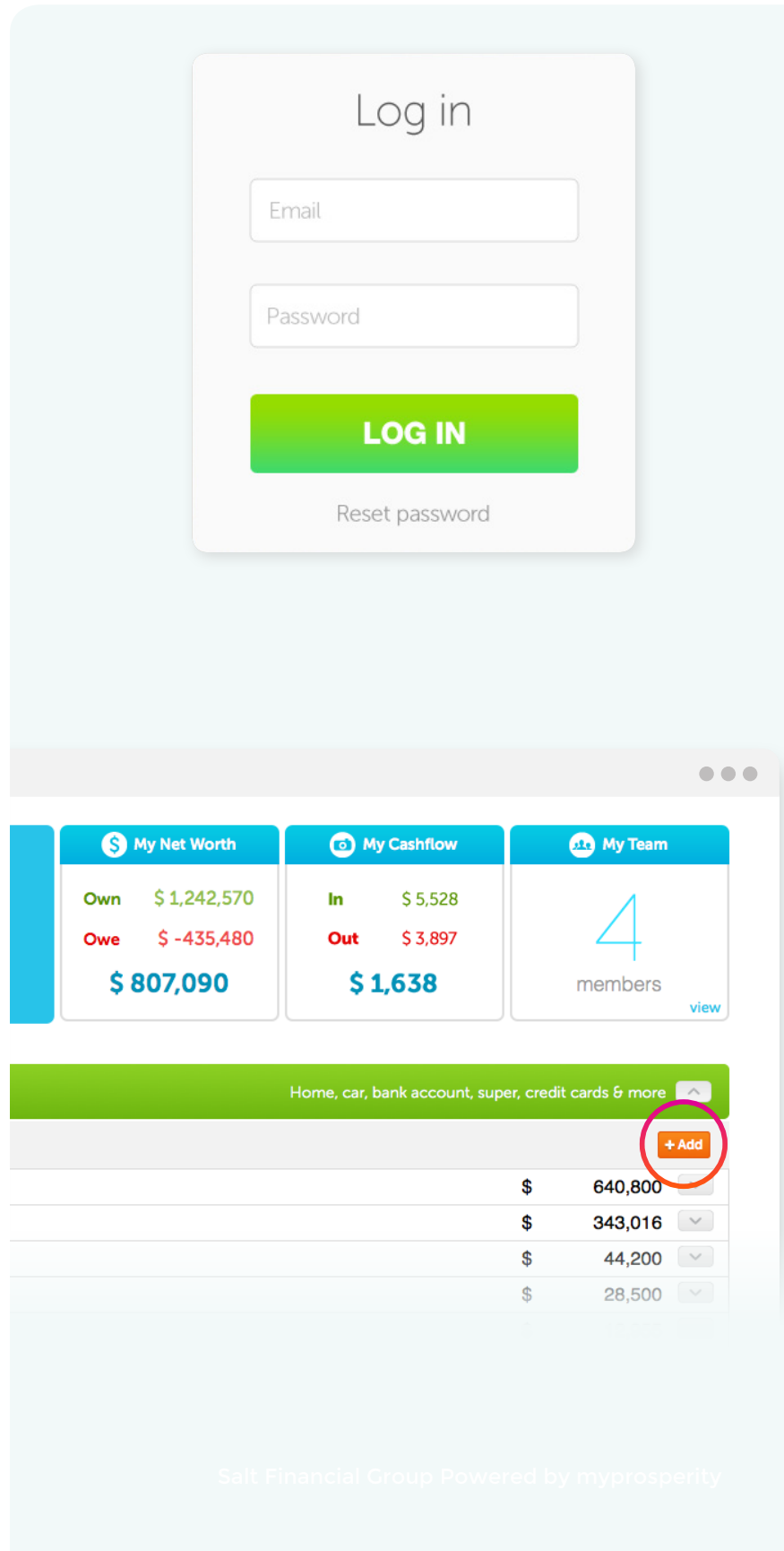
Never miss a deadline

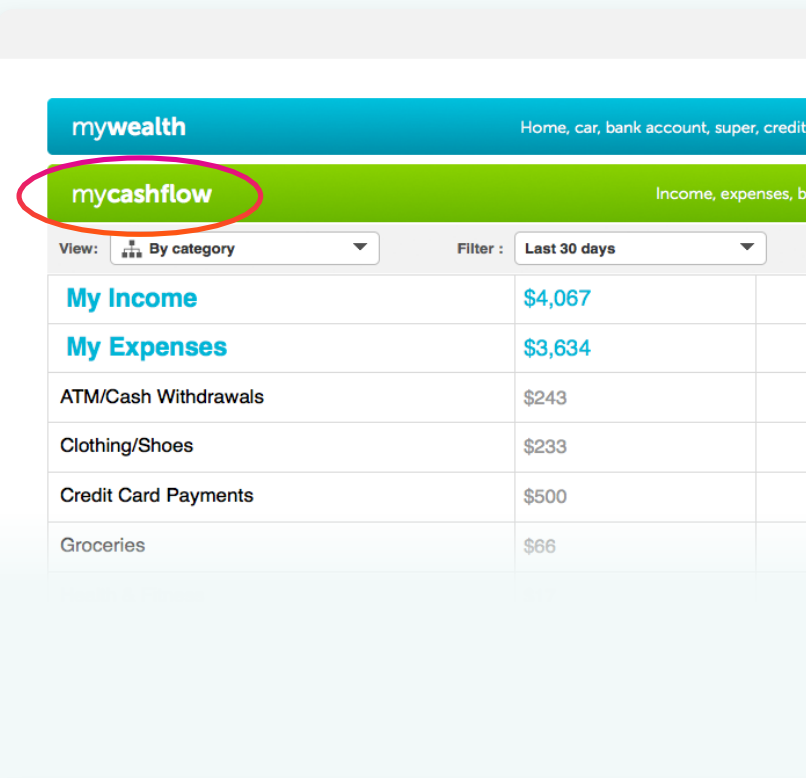
Once you've logged in you will be taken to your dashboard: this is where you can manage all of your finances.

Start with completing your net worth by adding all of your assets. Click on the mywealth tab, followed by the orange +add button on the right hand side of the screen.

This will take you to the screen where you can add all of your assets and liabilities. It's best to start with your biggest asset, your home.

After adding your home, continue to add all of your other assets such as your car, shares and bank accounts. When you have completed all of your assets, add your liabilities, such as your mortgage, credit cards and other loans.





3

Setting up mycashflow

If you haven't already added your bank accounts, add them now and see the benefits of utilising mycashflow.

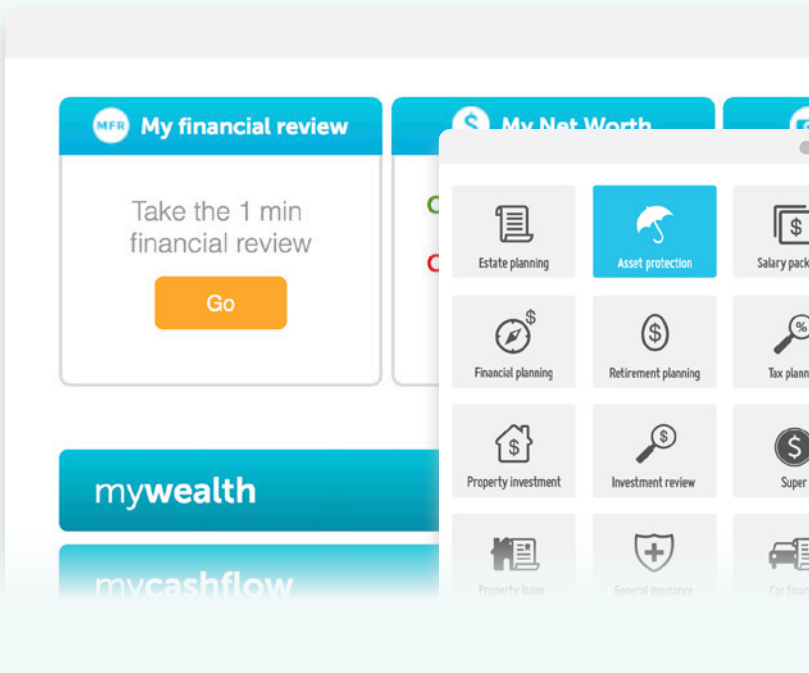
This tool will automatically categorise all of your transactions, allow you to tag particular transactions and create an instant budget for you.

This unique tracking system will allow you to easily identify your spending habits and allow you to find opportunities to save in areas you never expected.

4

my financial review

Select the my financial review tool, the blue tile on the left side of the screen, to review or decide on any new products or services your adviser has to offer to enhance your wealth.



5

Explore

Explore your personal wealth platform to see how it can assist you with any big financial decisions, such as buying your next property, planning for retirement or simply generating a personalised and detailed wealth report.

Your entire financial world in one place, easy to access, simple to use tools that will get your money organised.