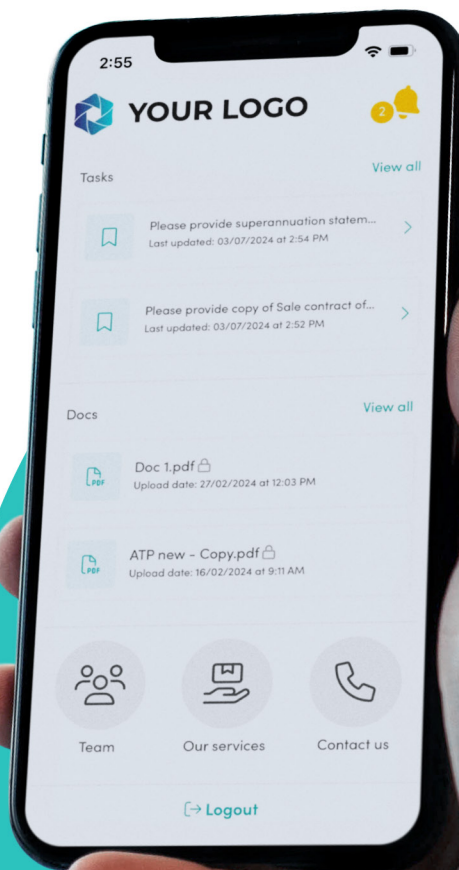


# myprosperity & Centrepoint partner to provide exclusive access to a secure all-in-one portal

myprosperity Lite is a secure online portal for essential advice processes and tasks. Eliminate reliance on email when interacting with your clients and their data online.

Harness a selection of features, including secure document sharing, digital signing and online forms and fact-finds, to provide a leading digital experience for your clients.



# Why do I need a client portal?



## Security

Protect your clients and your business



## Engagement

Better client experiences lead to more engaged clients



## Efficiency

Reduce time spent getting tasks done

53% of financial customers say they would switch providers for better digital experiences.<sup>1</sup>

**Email compromise and business email compromise** are the top sources of cybercrime in Australia.<sup>2</sup>

The use of digital signatures reduces customer onboarding times by 41% the time to contract completion by 68%.<sup>3</sup>

74% of businesses still email sensitive client documents direct to clients (such as SOAs).<sup>4</sup>

### Digital fact finds and forms



Including Centrepoint Fact Find & Risk Profile Questionnaire

### Secure document sharing



Remove reliance on email when communicating with your clients and their data online

### Digital document signing



Integration with digital signature capabilities

### Xplan integration



Reduce double handling of data

1. Salesforce, The Connected Financial Services Report, 2023

2. ASD Cyber Threat Report 2022-2023

3. Statistics provided by DocuSign - Digitising to meet the needs of today's wealth management clients, 2023

4. Statistics collected via responses to Finura Advice Tech Health Check as at 2024

# Bringing an exclusive myprosperity offer to your network

10% discount on monthly plan fee for Enhance, Accelerate and Mobile First.

Features	Lite (Exclusive)	Connect	Enhance	Accelerate	Mobile First
Price /month +GST	\$169	\$279	<del>\$399</del> \$359	<del>\$749</del> \$674	POA
Custom branded mobile app	⊗	⊗	⊗	⊗	✓
Starter client subscriptions	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Pro client subscriptions (included)	0 Pro Accounts	5 Pro Accounts	10 Pro Accounts	40 Pro Accounts	100 Pro Accounts
Pro client subscriptions (additional)	⊗	\$14.95 per client	\$14.95 per client	\$14.95 per client	\$14.95 per client
Staff licences for the practice portal	3	10	20	40	Unlimited
Document Storage	25GB	50GB	100GB	Unlimited	Unlimited
Digital Document Signing	✓ BYO*	⊗	✓ Includes Onespan & BYO*	✓ Includes Onespan & BYO*	✓ Includes Onespan & BYO*
Customised Fact Find	Licensee version only	⊗	✓	✓	✓
Rooms	⊗	⊗	✓	✓	✓
Client Focus Data Import (Xero PM, MYOB, XPLAN)	Xplan Only	✓	✓	✓	✓
Investment Feeds	⊗	⊗	✓	✓	✓

\*BYO - integrated with DocuSign, Annature, Fuse Sign

## Say goodbye to emails today.



Book a demo and discover how myprosperity can empower you to securely collaborate with your clients.



Sign up



Book a demo



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