K&P Wealth Portal

Everything in one place

Portal features

Take control with your personal wealth portal

Everything in one place

All your assets and liabilities are conveniently in one place so you can see everything you need at once. Link all your accounts and more.

Transactions

Auto-categorised to easily see where you are spending your money. Tag and filter to personalise, manage & reflect your life. Automatically set reports to monitor spending.

Wealth check snapshots

Track your wealth with monthly snapshots & summaries of all you own and owe. See your future wealth projections, review your financial priorities & receive a personalised action plan.

Budget is a breeze

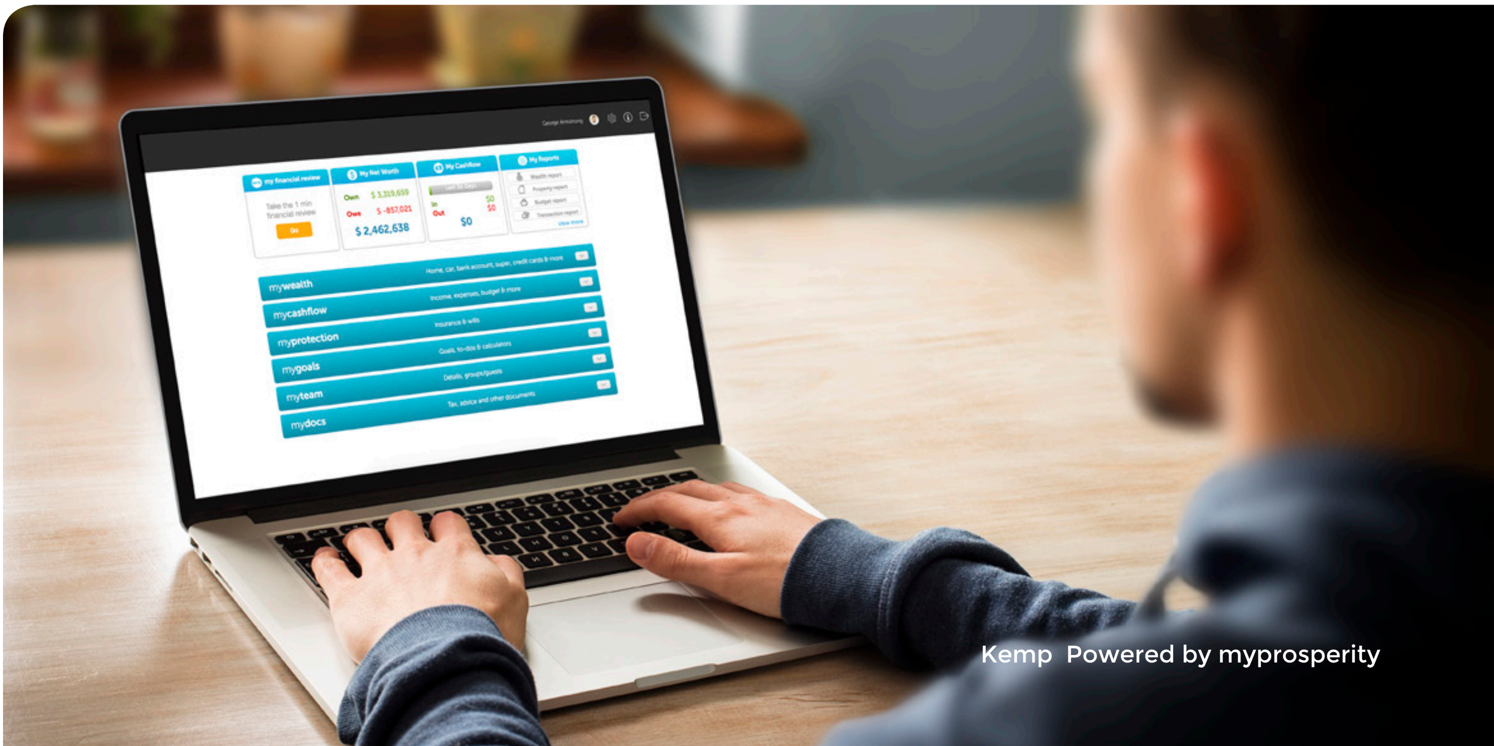
Say goodbye to spreadsheets. Take control with instant budgets created around your spending and set limits on categories.

Property and Vehicle information

Live data feeds and free valuations track the performance of your property and vehicles.

All the latest data

Updates from Australia's leading data providers ensure your information is always up to date.



Portal
Key features:

No more paper trails

Cut out paperwork. Forms are automatically completed for you where possible. Get sorted by uploading important documents (e.g. receipts, wills, contracts etc.) You can also view and manage all your insurance.

Build your A-team

Give guest access to those in your financial world you trust like your accountant, property manager or even your lawyer Your portal enables you to select what they can view, change or control.

Tax time? Piece of cake!

The end of the financial year and the end of stress! With the ability to tag & filter transactions as tax items, upload receipts & documents or allow your accountant access to do it all for you.

Manage your property

Send a request to your property manager to integrate your property & receive free benefits like property transactions, documents & receipts uploaded online. You'll also have access to special commands to help manage your property effectively.

All devices. All the time

Time is money and if there are decisions to be made you want to know your financial position in real time. Whether you are on desktop, tablet or smart phone, you'll have access to your entire financial world whenever you need it, 24/7.

Stay in control

Get sorted and be in control. Set & receive notifications, goals and use the calculator to stay on track to achieve your targets quickly. Your saving goals couldn't get any easier as the goal calculator enables you watch your money grow.

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Personal finances just went mobile

You can now access your wealth portal through your phone, so you'll always be able to control your finances. Simply download the myprosperity app, sign-in and you'll have access to your whole financial world.

GET IT ON Google Play

Download on the App Store

Data Collection

Up-to-date access to all your financial information, including all your assets and liabilities.

Cashflow

Keep track of your cash flow with the auto-categorisation of income and expenses.

Digital Document Signing

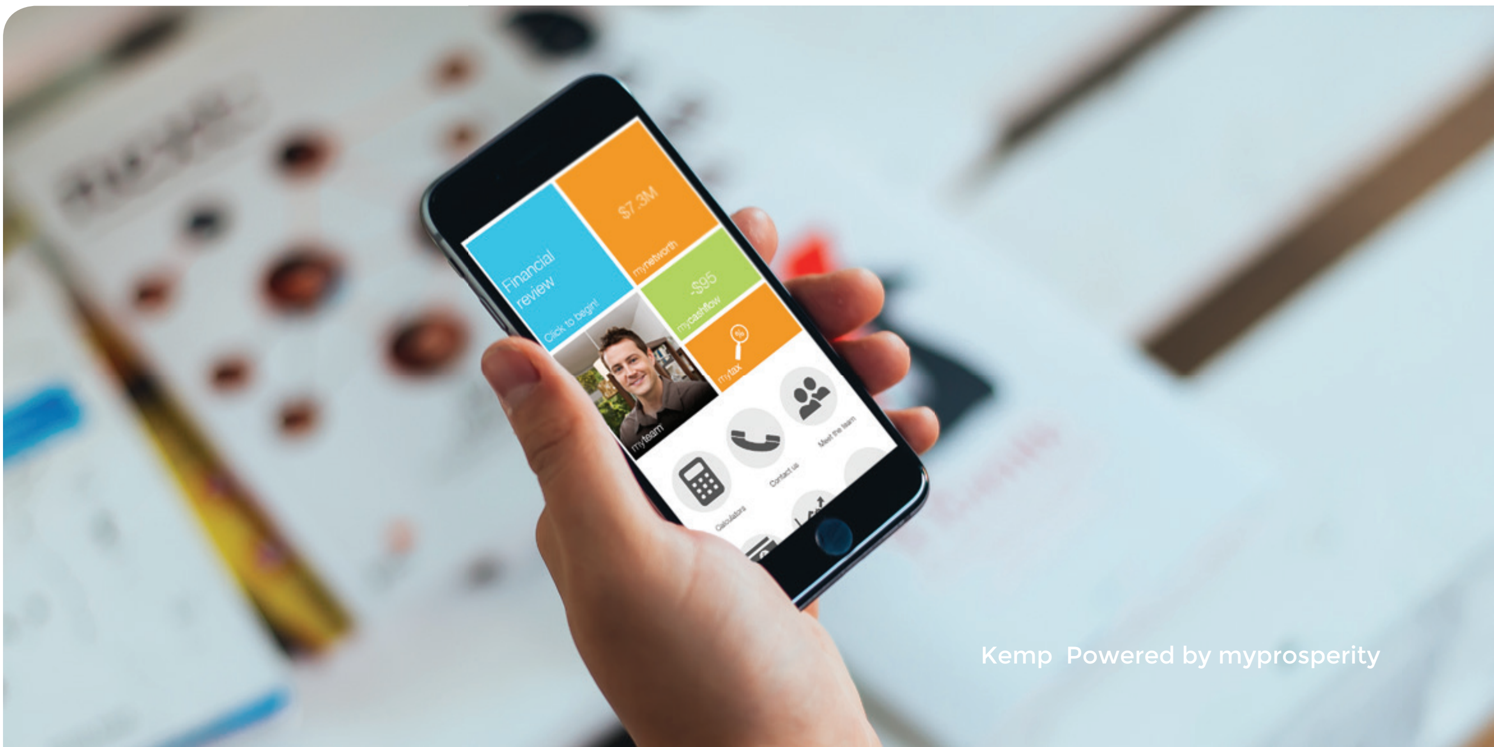
Sign those important documents digitally on any device.

Connect to a Professional

Connect with your adviser and request services.

Tax Time

Make tax time easy with all your financial data and documents stored securely in the cloud.



Managing your property has never been easier

Adding your home or investment property to your personal wealth portal helps provide you with a complete picture of your financial world.

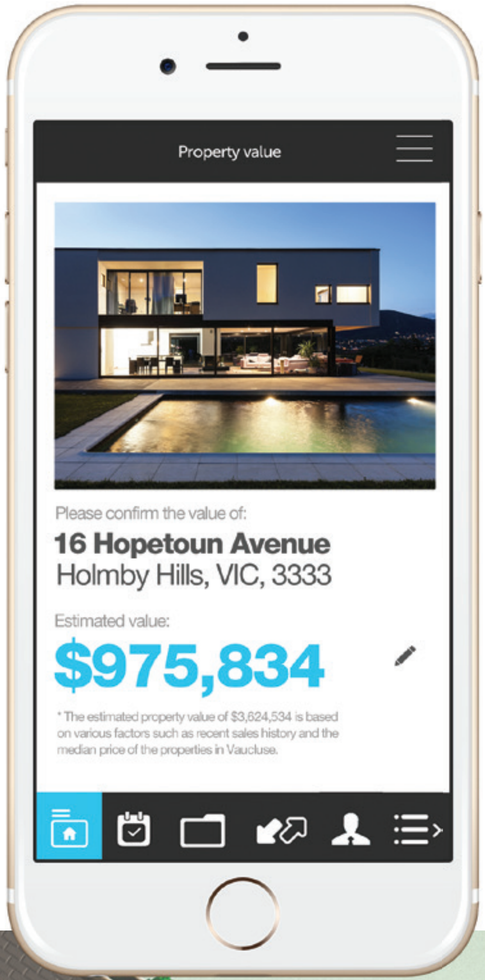
Add your property manager for **Integrated Rent Statements** and make tax time as simple as clicking a button.

Get monthly valuations on your investment properties and detailed reports to help you keep track of your property and suburb's performance.

Securely store your property purchase documents and depreciation schedules in the portal.

Use the new property tools to discover how much equity you have, find out what you can buy right now, and track your progress towards buying your next property.

Make tax time easy with the ability to tag & filter transactions as tax items, upload receipts & documents.



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Estate planning redefined

Do the right thing by your loved ones.

50% of Australians don't have a will. Use the wealth portal's estate planning features to get your affairs in order. Get a new will or if you already have one, upload it to the wealth portal alongside the other important documents your executor and heirs might need.

Ultimate peace of mind

Your wealth portal's myprotection area helps you keep all your important documents organised. Upload your will, insurances, and instructions so your loved ones know exactly where to find them.

Get a will from the experts

Don't have a will? The Will Wizard asks a series of simple questions to assess your estate planning needs. If appropriate, it'll generate a will for you and your spouse from a template provided by specialist law firm, View Legal.

The right will at the right time

Should you have more complex estate planning wishes - overseas beneficiaries, a family trust, etc. - the Will Wizard will notify your adviser so they can introduce you to a specialist law firm.

Create an Executor Kit

Don't leave your loved ones in the lurch. Upload your signed will to the wealth portal and create an Executor Kit - a summary document outlining your wishes and estate - so your executor has everything they need.

Introducing digital document signing

Go paperless with digital document signing.

Digital signatures are a quick, easy and secure way to sign important documents from your adviser.

Anytime, anywhere

At home or on the go, sign documents on your desktop, tablet or mobile from your personal wealth portal.

Store everything in one place

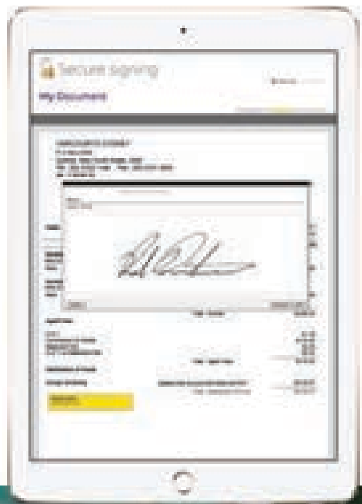
Sign then store your documents in the cloud for easy access. Your data is secure and you can enable multi-factor authentication on your wealth portal for further peace of mind.

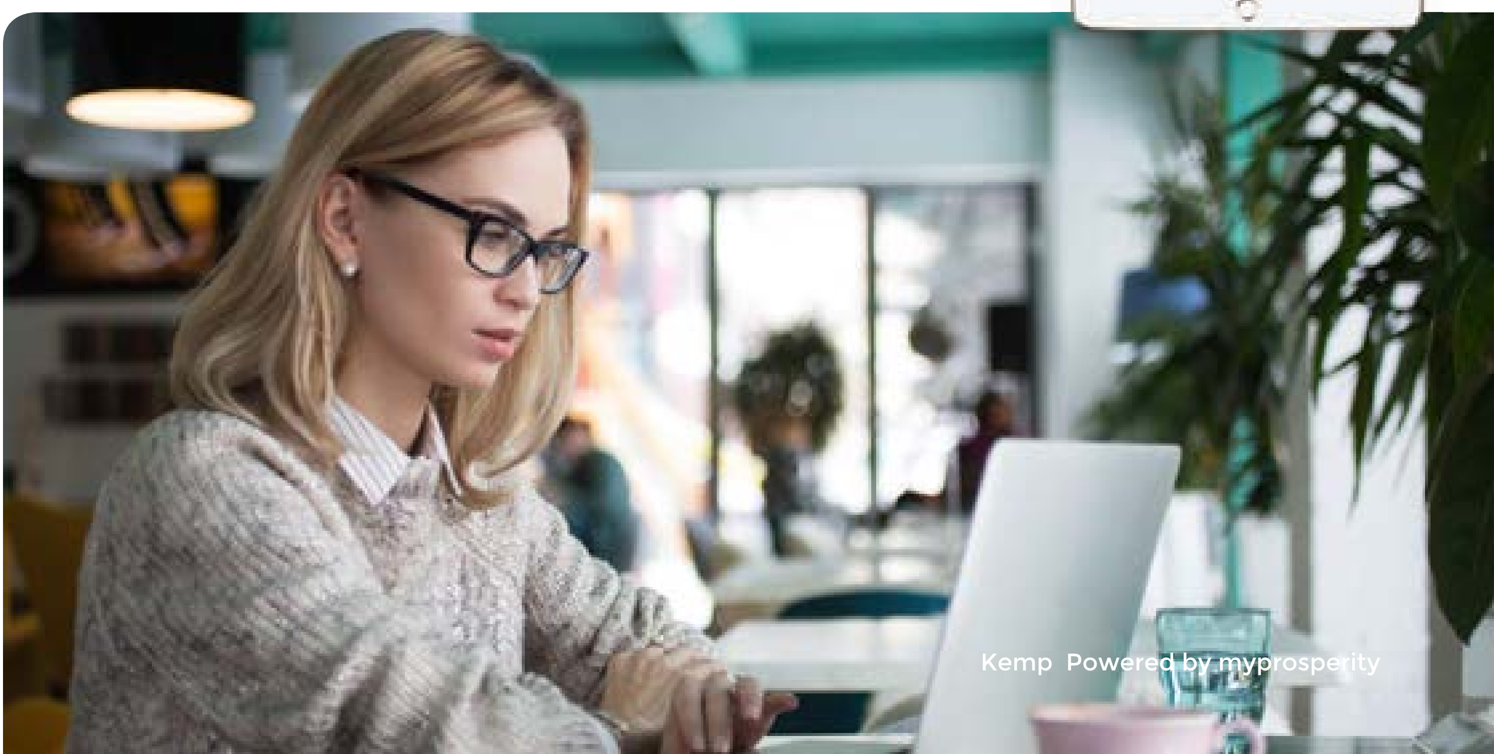
Save time

Say goodbye to last minute printer hangups and rush hour at the post office. Read, sign, confirm and send in just a few seconds with a click of your mouse (or finger).

Never miss a deadline

Download the wealth portal app to get notifications, and never miss a deadline for important documents. No app? No problem - you'll also receive email reminders.





Security

Know with confidence your information is safe.

Bank Level Security

You can be confident that your important information is safe. We use the same 256-bit encryption and physical security that banks use to protect your private details and our practices are monitored and verified by **Verisign** and supported by **McAfee Security**.

No one can touch your money

As this is a 'read-only' service, your money is untouchable - by you and anyone else! The purpose is to organise and analyse your finances, not to pay bills or transfer money. There is no functionality to allow you to move funds in or out of any accounts so your cash is safe.

Trusted by over 60 million worldwide

We have partnered with Yodlee - the same technology chosen by 600 leading banks, financial institutions and companies around the globe - to provide a robust, secure and customer-centric platform.