

# myprosperity

<b>Contact:</b>	Karolina Kuszyk (KK)
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## **BFP Member Benefit & Special Pricing Arrangement**

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**Business Name** myprosperity

[www.myprosperity.com.au](http://www.myprosperity.com.au)

### **Synopsis of Business**

Simply myprosperity helps advisers and accountants manager their clients financial world better. Founded in 2011, myprosperity is on a mission to help households live their best financial lives. In a world of financial complexity and friction, we have emerged as the leading secure client portal solution to make it easier for households to collaborate with their advisers across all aspects of their financial lives.

### **Product/Service Description**

- All in one secure firm branded client portal & app
- Xplan integration: Client List, IPS, Balance Sheet, Fact Find
- Collaborate securely with clients in cybersecure chat rooms
- ISO27001 certified and 2 Factor Authentication.
- Create neat rooms for different topics i.e. Super, Insurances, Investments etc
- Share documentation securely
- Sign documents quickly
- Gather information quickly and securely via the digital fact finds
- Onboarding new clients fast, better client experience
- Ability to connect bank accounts, credit cards, homeloans, portfolios, industry super funds, cars, properties data feeds.
- Ability to view transactions such as centrelink payments
- Collaborate with other professionals, safely in the portal i.e. solicitors, accountants, mortgage brokers...
- Don't get lost in email, be front of mind with in app notifications
- We want to help you be where the clients are and they are always on their phone
- Digitalise your firm and gain efficiencies in 2023!
- Be in the pocket of all of your clients!

See our Adviser implementation strategies and testimonials:

<https://www.myprosperity.com.au/blog/>

<https://www.myprosperity.com.au/case-study/>

## **BFP Pricing Arrangement**

Pricing will be explained via webinar or discussion. If any firm decides to sign up to myprosperity on any package, we will automatically add 2 x additional Pro client accounts for life.

This Offer will remain in force until amended, updated or withdrawn by us

## **Process to Access Offer**

Offer will be available after the webinar to any firm that signs up to any myprosperity package. The pricing will be explained during the presentation OR contact Karolina directly for a one on one discussion.

## **Business Representative Details**

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