

Client Portal for our clients

As the Client you will get two notifications that you have been set up with two emails one for the user ID which is the email below.

Welcome to your Portal!

Hi Syarra,

You are receiving this email because we have now enabled your **Portal**, an online portal which will allow you to securely view selected important documents, portfolio data and communicate with your Financial Adviser.

Your **Portal** has a digital signatures facility which will allow you to digitally authenticate documents which require a signature for us to proceed. You can do this in your own time, from home, or anywhere where you have access to the internet. Instructions on how to access the portal are provided below.

You can access your Portal by navigating to the login page, which has been sent to you in a separate email, and entering your login details below:

- **User ID:** Svarra Xnlan5
- **Password:** This has been sent to you in a separate email.

Note:
If you wish to change your password this can be done once you have logged in, under 'My Account'.

Regards,

Your Advice Team

The second will outline your password and the link to the Practice Client Portal.

Welcome to your Portal!

Hi Syarra,

You are receiving this email because we have now enabled your **Portal**, an online portal which will allow you to securely view selected important documents, portfolio data and communicate with your Financial Adviser.

Your **Portal** has a digital signatures facility which will allow you to digitally authenticate documents which require a signature for us to proceed. You can do this in your own time, from home, or anywhere where you have access to the internet. Instructions on how to access the portal are provided below.

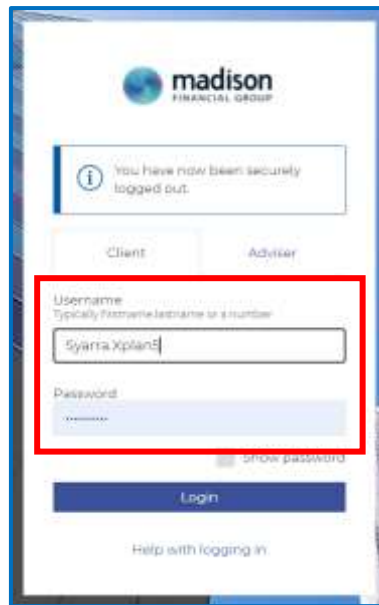
You can access your Portal by navigating to the [login](#) page and entering your login details below:

- **User ID:** This has been sent to you in a separate email.
- **Password:** Summer2021

Note:
You will need to change your password this can be done once you have logged in, under 'My Account'.

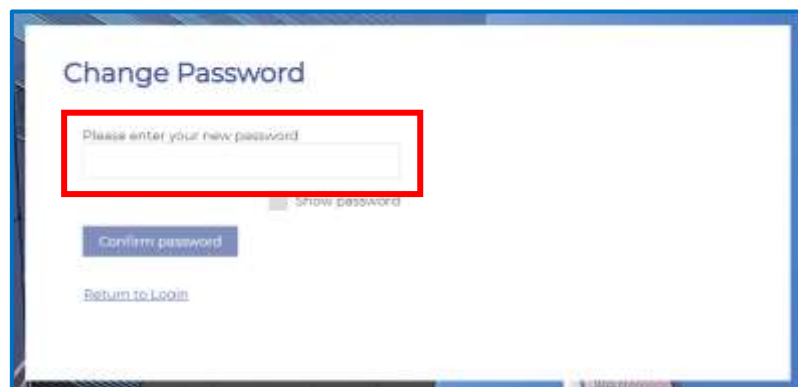
Regards,

By clicking on the link this will take you to the practice's Client Portal login page.



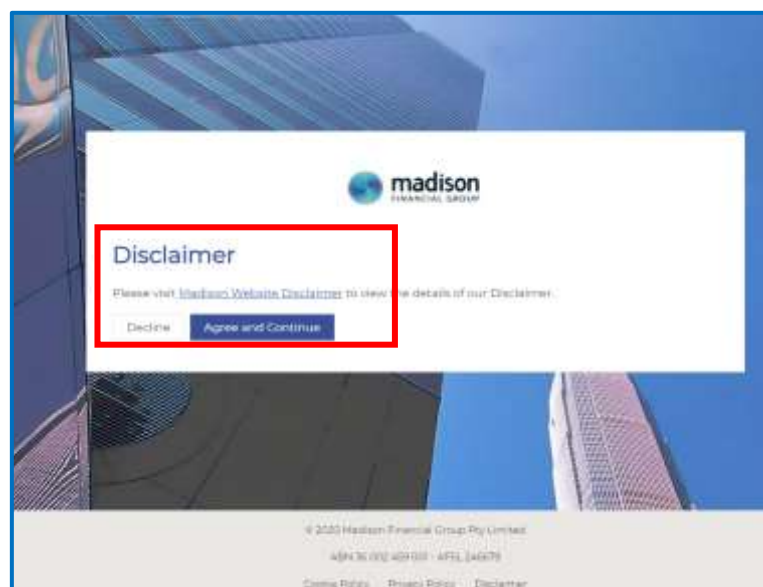
The image shows the login page for the Madison Financial Group Client Portal. At the top is the Madison Financial Group logo. Below it is a message: "You have not been securely logged out." There are two tabs: "Client" and "Adviser". The "Client" tab is selected. Below the tabs are two input fields: "Username" (with a hint "Typically first name, last name or a number") and "Password". The "Username" field contains the text "Syarra Xpland". Below the password field is a "show password" link. At the bottom is a "Login" button and a link "Help with logging in". A red rectangle highlights the "Username" and "Password" fields.

Then when you login you are prompted to change your password for Client Portal.



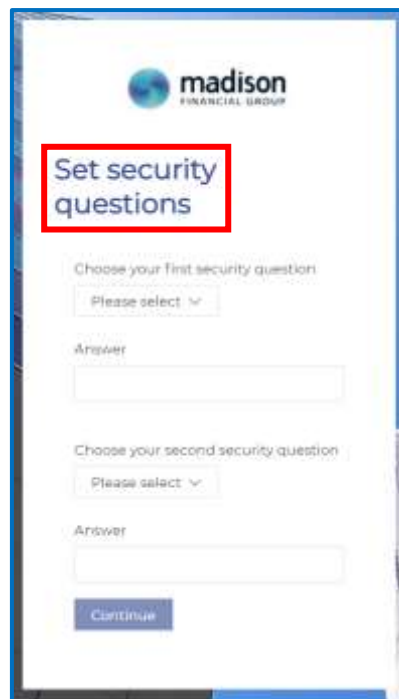
The image shows the "Change Password" screen. At the top is the title "Change Password". Below it is a message: "Please enter your new password". There is a text input field for the new password. Below the input field is a "show password" link. At the bottom is a "Confirm password" button and a link "Return to Login". A red rectangle highlights the "Please enter your new password" text and the input field.

The next screen that will display for you is the disclaimer screen for you to Agree and Continue.

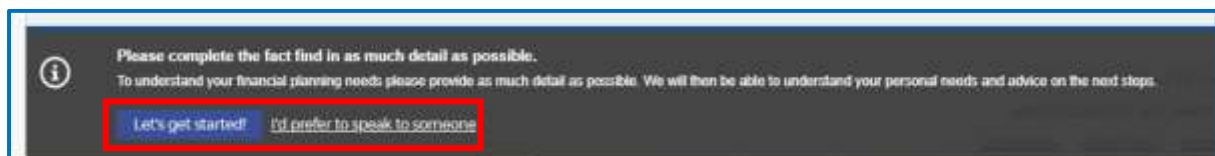


The image shows the "Disclaimer" screen. At the top is the Madison Financial Group logo. Below it is the title "Disclaimer". Below the title is a message: "Please visit [Madison Website Disclaimer](#) to view the details of our Disclaimer." At the bottom are two buttons: "Decline" and "Agree and Continue". A red rectangle highlights the "Disclaimer" title and the "Agree and Continue" button. At the bottom of the screen is a footer with the text: "© 2020 Madison Financial Group Pty Limited", "AFSL 346078", and links for "Home", "About", "Contact Us", and "Privacy Policy".

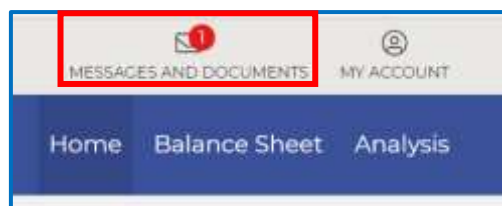
Then you are asked to complete two security questions.



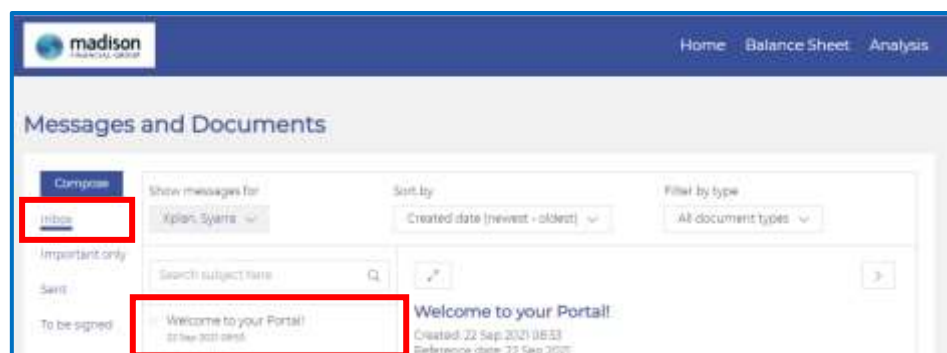
When you arrive at the landing page you will see the ability down along the bottom of the screen to complete the fact find (if this has been enabled for you). The client can click on the **Let's get started!** or they can click on **I'd prefer to speak to someone** and that will notify your adviser.



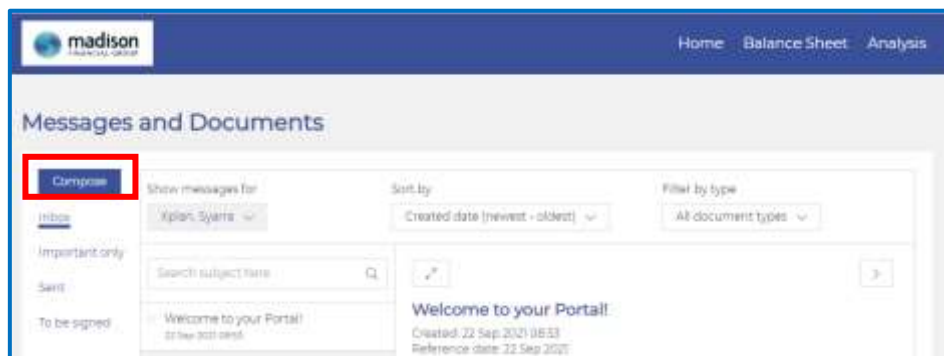
You will also see up in the right hand corner your Messages and Documents will have a red 1 showing.



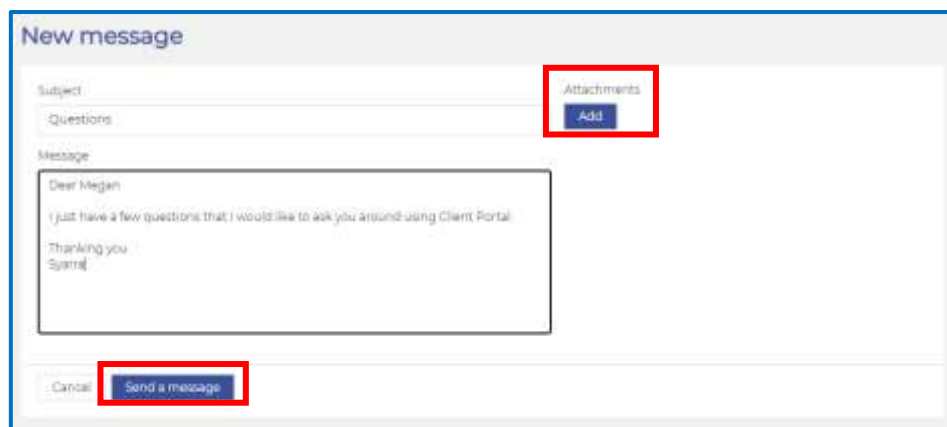
If you click on this, you will see a copy of the second email that was sent to you with your Password and link to login into Client Portal.



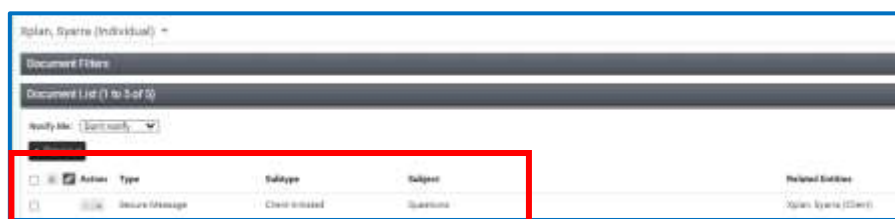
If you wanted to compose a message back the practice you can click on the Compose button above Inbox (otherwise you can just click on Reply within the Message).



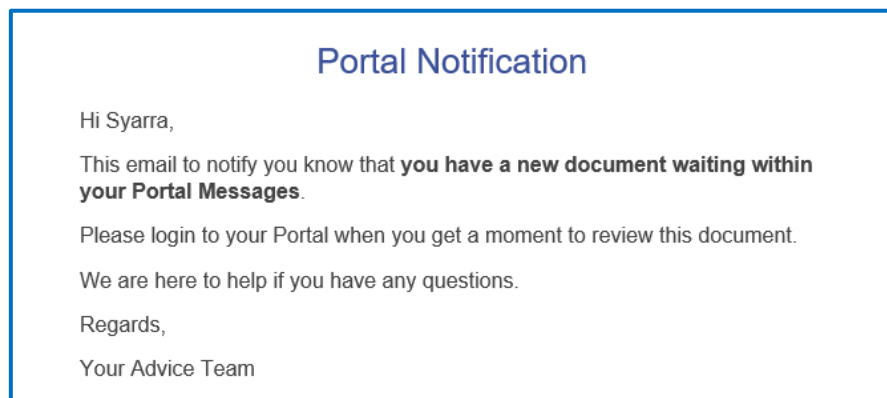
Then a New Message screen appears for you to add in your Message. You will also note that you can add in Attachments. When you are ready you can click on Send a Message and the adviser will be notified that you have sent a message, and this will be sorted in XPlan as a file note as well as in your Sent messages in Client Portal.



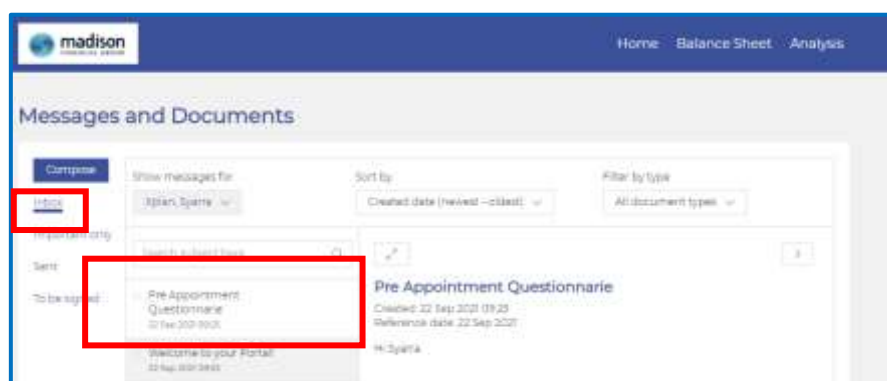
This is sent to your Adviser and saved as a File Note within XPlan.



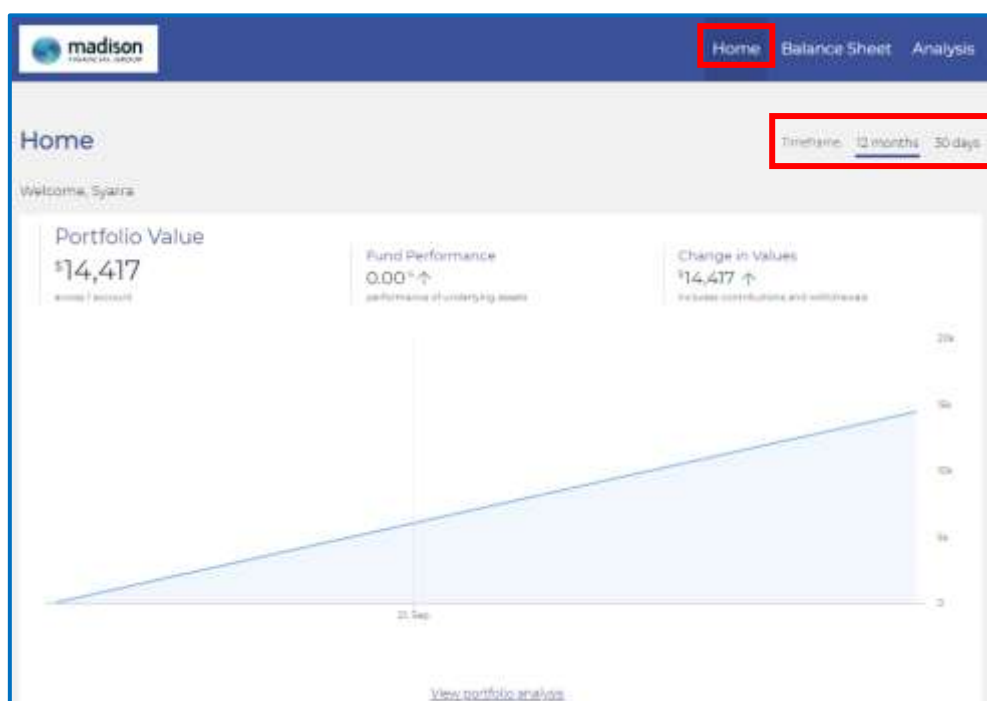
When a message is sent to you from your Adviser within XPlan you will get the following email to notify you.



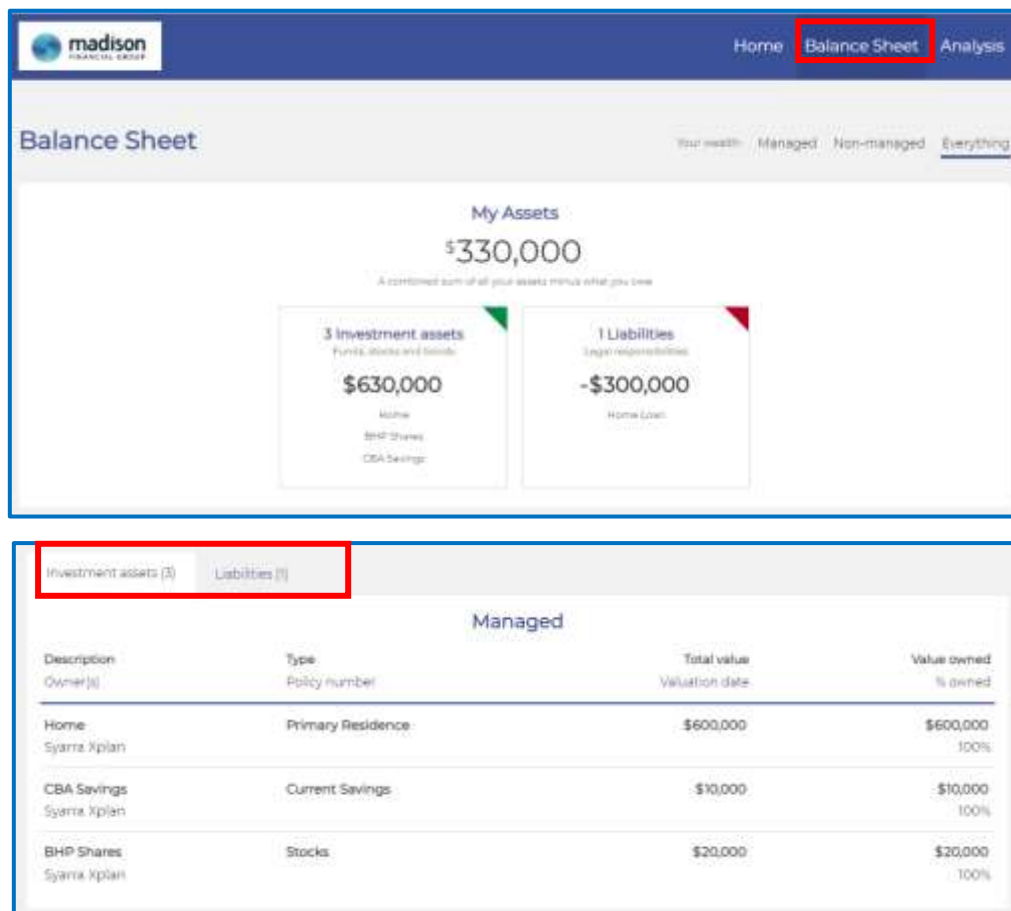
Once again you can login back into Client Poral and under Messages and Documents you will see the new message.



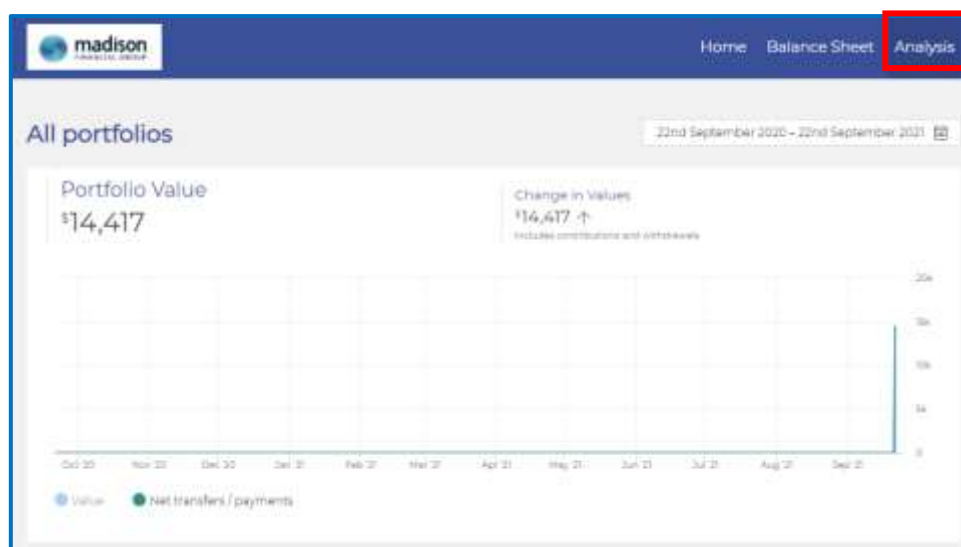
If you click on the **Home** button this will take you to the landing page of Client Portal. This will display your Portfolio Value and how it has tracked along with Fund Performance and the Change in Value over the last 12 months. You can change this view by clicking on 30 days as the Timeframe.



Next to the Home button is the Balance Sheet. You can break down what you can see within this screen.



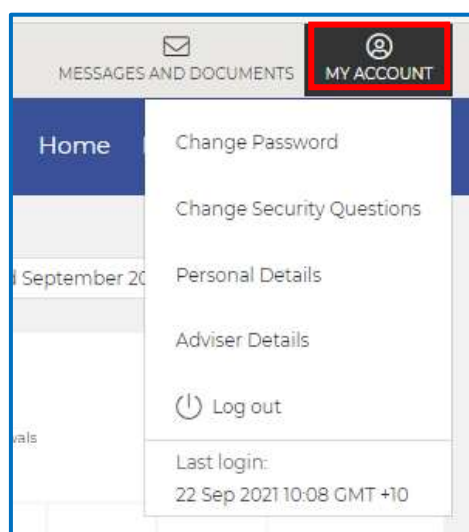
The last screen is your Analysis. Which you can change the date range and the graph is interactive with you.



At the bottom of the screen, we can go through more details on the Portfolio with each of the different tabs.

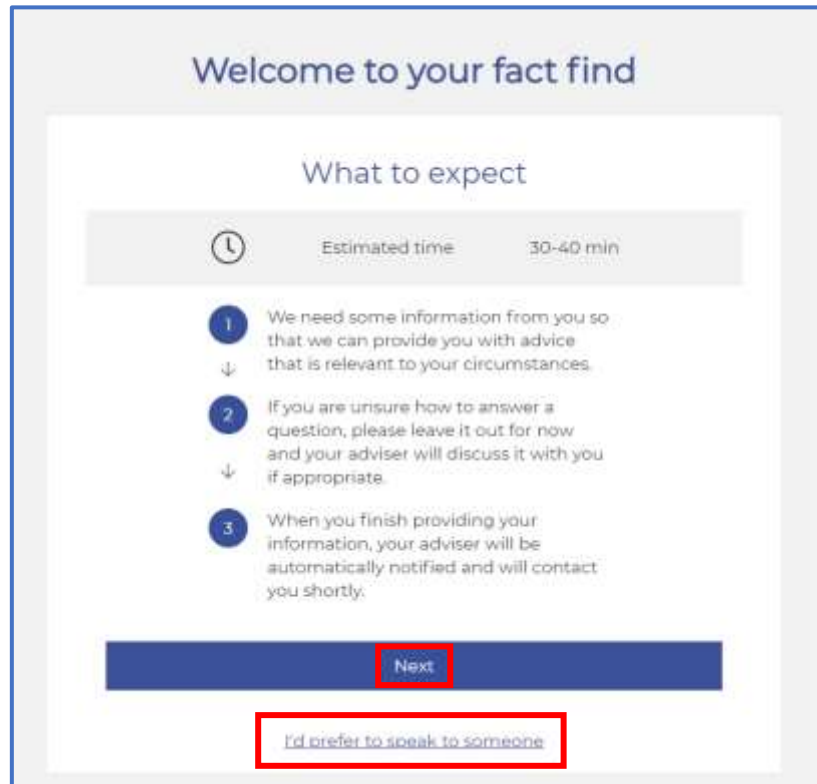
Portfolios	Investments	Allocation	Transactions	
Trade date	Security	Account	Value	Details
22/09/2021	Commonwealth Bank - Ordinary Fully Paid (CBA) Initial Balance	Default	10,034.00 AUD	Narrative Initial Balance: 1000000004 Commonwealth Bank of Australia (CBA)
22/09/2021	BHP Group Limited - Ordinary Fully Paid (BHP) Initial Balance	Default	3,775.00 AUD	Value after fees and taxes 10,034.00 AUD
22/09/2021	ADP - UNITS FULLY PAID (ADP) Initial Balance	Default	608.00 AUD	Fees 0.00 AUD Taxes 0.00 AUD

When you are ready to Logout or you wish to change your details you can click on My Account up in the right hand corner and a drop down menu will appear.



If the Onboarding Fact Find has been enabled for you, you will need to complete it.

Welcome to your Fact Find screen is displayed. This outlines what to expect and the estimate time frame for completion. You will also note that at any time you are able to Speak to someone. Click Next.



This screenshot shows the 'Welcome to your fact find' screen. The title 'Welcome to your fact find' is at the top. Below it is the section 'What to expect'. A clock icon is next to the text 'Estimated time 30-40 min'. There are three numbered steps: 1. 'We need some information from you so that we can provide you with advice that is relevant to your circumstances.' 2. 'If you are unsure how to answer a question, please leave it out for now and your adviser will discuss it with you if appropriate.' 3. 'When you finish providing your information, your adviser will be automatically notified and will contact you shortly.' At the bottom, there is a blue button labeled 'Next' and a link labeled 'I'd prefer to speak to someone'.

Welcome to your fact find

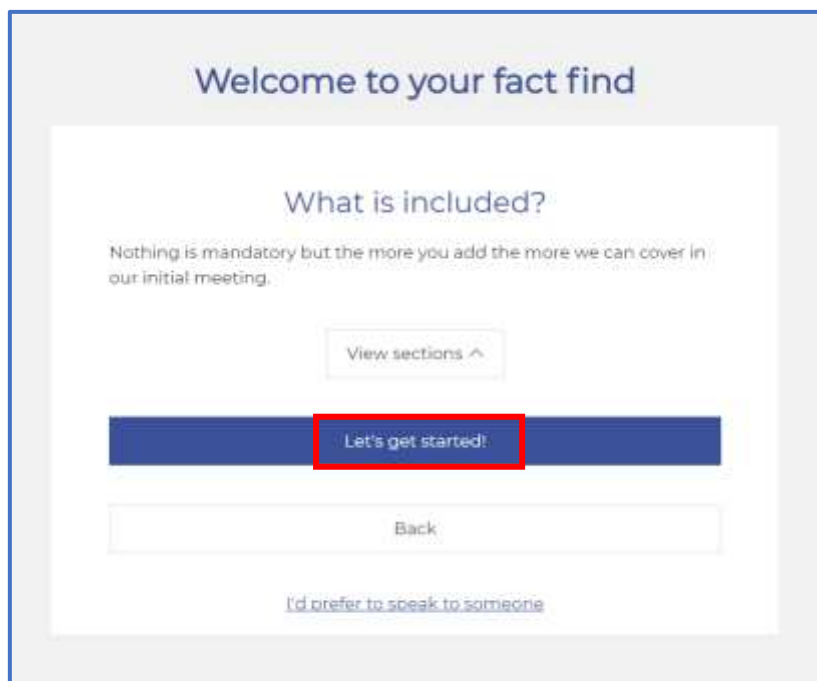
What to expect

Estimated time 30-40 min

- 1 We need some information from you so that we can provide you with advice that is relevant to your circumstances.
- 2 If you are unsure how to answer a question, please leave it out for now and your adviser will discuss it with you if appropriate.
- 3 When you finish providing your information, your adviser will be automatically notified and will contact you shortly.

Next

[I'd prefer to speak to someone](#)



This screenshot shows the 'Welcome to your fact find' screen. The title 'Welcome to your fact find' is at the top. Below it is the section 'What is included?'. The text says 'Nothing is mandatory but the more you add the more we can cover in our initial meeting.' There is a button labeled 'View sections ^'. Below that is a blue button labeled 'Let's get started!'. At the bottom, there is a button labeled 'Back' and a link labeled 'I'd prefer to speak to someone'.

Welcome to your fact find

What is included?

Nothing is mandatory but the more you add the more we can cover in our initial meeting.

View sections ^

Let's get started!

Back

[I'd prefer to speak to someone](#)

You can go between sections and can save and exit at any stage of the fact find onboarding process.

Welcome

About you

About your work

Your address details

Your properties

Your mortgages

About your investments


Your superannuation

Other income

About your expenses

Submission

About you



Tell us a little about you

Next we'll capture some information about you. Nothing is mandatory so feel free to skip any questions if you are uncomfortable or if you don't have the information to hand.

Tell us about yourself

[Skip to next section](#)

Save & exit

Personal Details are as follows that are captured in Client Portal. Once completed click on Save & continue.

Welcome

About you

About your work

Your address details

Your properties

Your mortgages

About your investments

Your superannuation

Other income

About your expenses

Submission

Personal details

* Title

Ms

* First name

Syaris

Middle name(s)

* Surname / Family name

Xplan

Preferred name to be known by

Syaris

Birth surname

Xplan

Date of birth

17/11/1973

Next is the Tax Resident status. Click Save & continue.

Welcome

Personal details

About you

About your work

Your address details

Your properties

Your mortgages

Tax resident status

☒ Resident

☐ Non Resident

Back

Save & exit

Save & continue

Your Health is the next section of the onboarding Fact Find. Click on Save & continue.

Welcome

Your health

About you

About your work

Your address details

Your properties

Your mortgages

About your investments

Your superannuation

Other income

Health status

☐ Poor

☒ Good

☐ Very Good

☐ Excellent

☐ Average

☐ Fair

Have you been a smoker in the last 12 months?

☐ Yes

☒ No

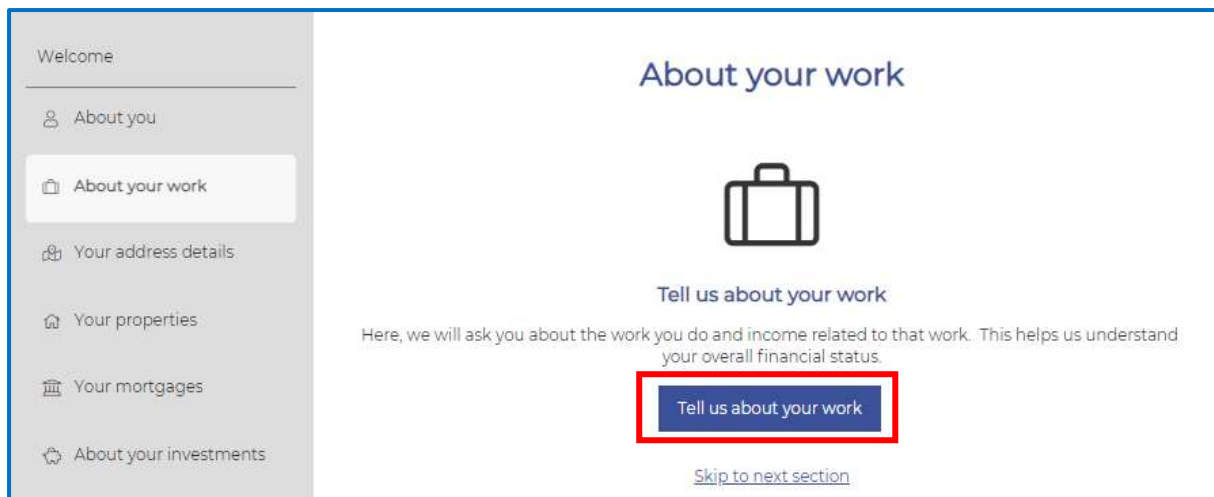
Back

Save & exit

Save & continue

Contact details are next and they are just confirming the details you have completed. Save & continue.

About your work is next. Click on Tell us about your work to complete this section.



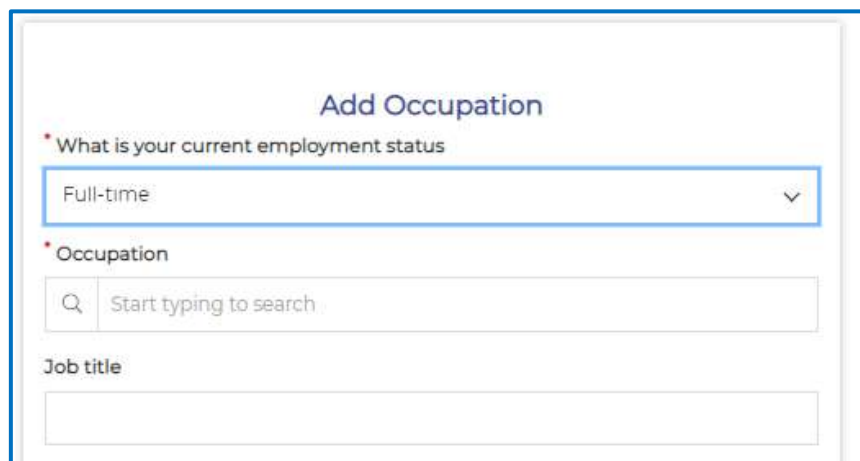
The screenshot shows a sidebar on the left with a 'Welcome' header and a list of menu items: 'About you', 'About your work' (highlighted), 'Your address details', 'Your properties', 'Your mortgages', and 'About your investments'. The main content area is titled 'About your work' and features a briefcase icon. Below the icon, the text reads 'Tell us about your work' followed by a paragraph: 'Here, we will ask you about the work you do and income related to that work. This helps us understand your overall financial status.' A blue button labeled 'Tell us about your work' is highlighted with a red rectangle. At the bottom, there is a link that says 'Skip to next section'.

Work Details click on Add occupation and this opens a new screen for you to complete. Click Save & continue.



The screenshot shows the same sidebar as the previous image. The main content area is titled 'Occupations' and features a large blue button labeled 'Add occupation', which is highlighted with a red rectangle.

This field will expand. Complete the fields and click on Save & continue.



The screenshot shows a form titled 'Add Occupation'. It contains three main sections: 1. 'What is your current employment status' with a dropdown menu showing 'Full-time'. 2. 'Occupation' with a search input field containing the placeholder text 'Start typing to search'. 3. 'Job title' with a text input field.

Welcome

About you

About your work

Your address details

Your properties

Your mortgages

About your investments

Occupations

Add occupation

Client	Job Title	Salary
Syarra	Advice Integration Manager Madison Financial Group	\$100,000 Annually

Back

Save & exit

Save & continue

The next section is Your address details. Click on Tell us about your work to complete this section.

Welcome

About you

About your work


Your address details

Your properties

Your mortgages

About your investments

Your address details



Tell us about your home address

Next we will ask about your home address and any other addresses you may have.

Tell us about your addresses

[Skip to next section](#)

Click on Add Address and complete this section. Once finished click on Save & continue.

Welcome

About you

About your work

Your address details

About your addresses

Add Address

Once finished click on Save & continue.

Welcome

About you

About your work

Your address details

Your properties

Your mortgages

About your investments

About your addresses

Add Address

Address Type	Address
Residential	15 Manning Street South Brisbane QLD 4101 Australia

Back

Save & exit

Save & continue

Your properties is next. Click on Tell us about your work to complete this section.

Welcome

About you

About your work

Your address details


Your properties

Your mortgages

About your investments

Your superannuation

Your properties



Tell us about your properties

Your properties will include your main residence, second homes, holiday homes and other properties owned by you

Tell us about your properties

I don't own any properties

[Skip to next section](#)

Click on Add current address as a property. This will add in this property. To add in an additional Property, click on Add Property. Once finished click Save & continue.

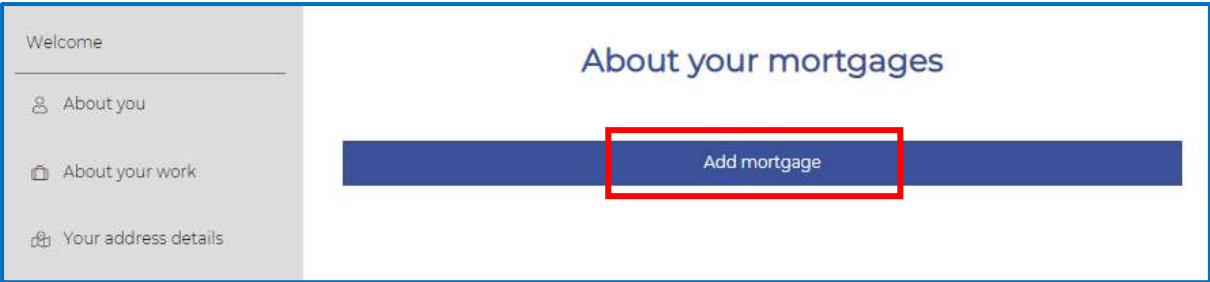
The screenshot shows the 'About your properties' page. On the left is a sidebar with a 'Welcome' header and a list of menu items: 'About you', 'About your work', 'Your address details', 'Your properties' (highlighted), 'Your mortgages', and 'About your investments'. The main content area has the title 'About your properties' and a section titled 'Add current address as a property?'. This section displays the 'Current address' as '15 Manning Street South Brisbane QLD 4101 Australia' and features a blue button labeled 'Add current address as a property' which is highlighted with a red rectangular box. At the bottom of the main area is a wide blue button labeled 'Add property'.

This screenshot shows the 'About your properties' page after a property has been added. The sidebar is identical to the previous screenshot. The main content area displays a table with two columns: 'Property type' and 'Address'. The first row shows 'Primary Residence' (with 'Home' in smaller text below it) and the address '15 Manning Street South Brisbane QLD 4101 Australia'. Below the table is a wide blue button labeled 'Add property', which is highlighted with a red rectangular box. At the bottom of the page, there are three buttons: 'Back', 'Save & exit', and 'Save & continue'. The 'Save & continue' button is highlighted with a red rectangular box.

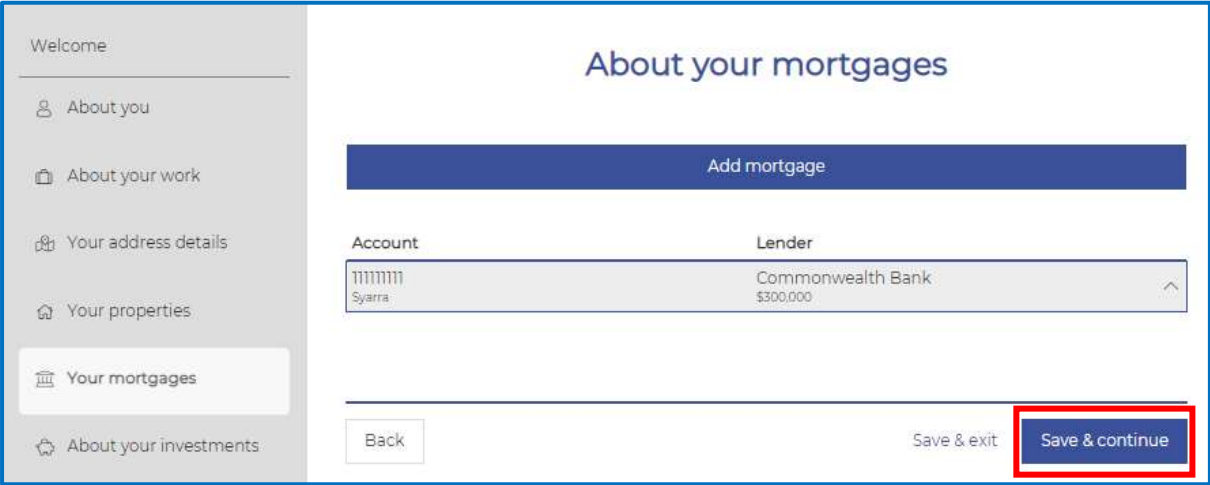
Next is Your mortgages. Click on Tell us about your mortgages.

The screenshot shows the 'Your mortgages' page. The sidebar on the left is updated with an additional item, 'Your superannuation', below 'About your investments'. The main content area has the title 'Your mortgages' and a house icon. Below the icon is the heading 'Tell us about your mortgages' followed by the text: 'We want to understand what secured borrowing you currently have in place. If you have it to hand, a recent mortgage statement may be helpful'. A blue button labeled 'Tell us about your mortgages' is highlighted with a red rectangular box. Below this button is a white button labeled 'I do not have any mortgages'. At the bottom of the page is a link that says 'Skip to next section'.

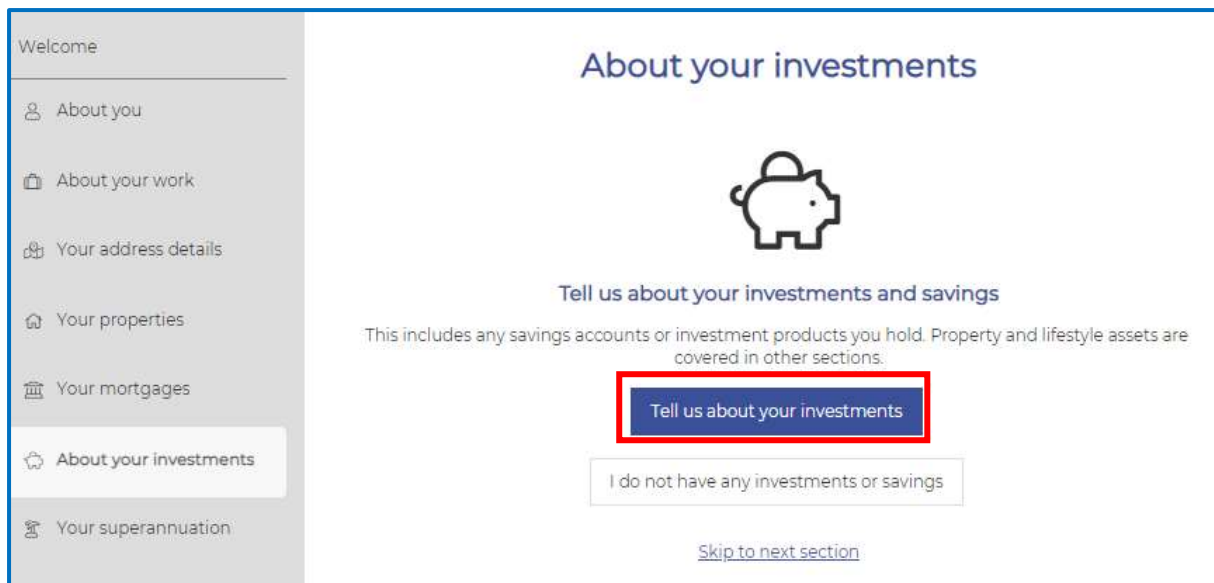
Click on Add mortgage. Add in this information and then click on Save & continue.

This screenshot shows the 'Add Mortgage' form. It contains the following fields and options:

- Title: 'Add Mortgage'
- Question: 'What type of mortgage is it?' with a dropdown menu showing 'Primary Residence Mortgage'.
- Question: 'Is anyone else responsible for paying this mortgage with you?' with radio buttons for 'Yes' and 'No' (selected).
- Question: 'Who is your mortgage lender?' with a search input field containing 'Commonwealth Bank'.




Next is About your investments. Click on Tell us about your mortgages.



Welcome

- About you
- About your work
- Your address details
- Your properties
- Your mortgages
- About your investments**
- Your superannuation

About your investments



Tell us about your investments and savings

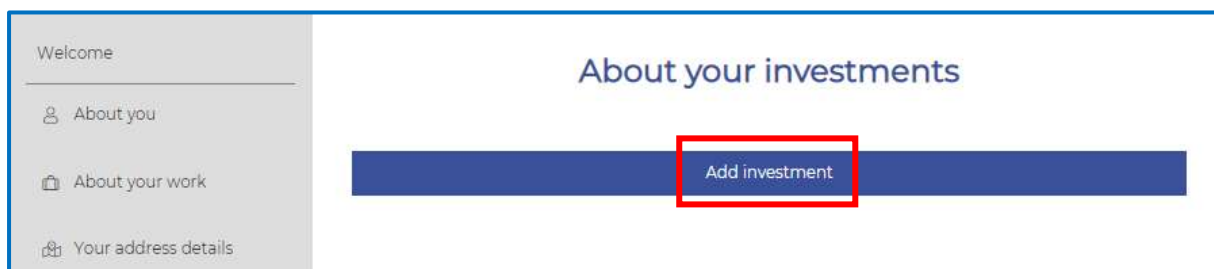
This includes any savings accounts or investment products you hold. Property and lifestyle assets are covered in other sections.

Tell us about your investments

[I do not have any investments or savings](#)

[Skip to next section](#)

Click on Add investment. Once completed click on Save & continue.

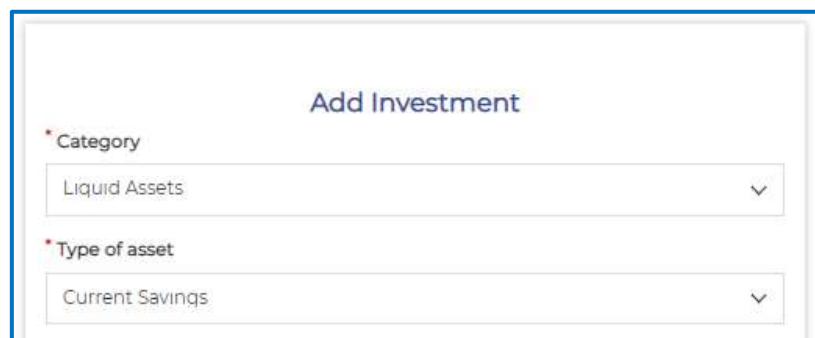


Welcome

- About you
- About your work
- Your address details

About your investments

Add investment



Add Investment

* **Category**

Liquid Assets

* **Type of asset**

Current Savings

To move onto the next section, click on Save & continue.

The screenshot shows a user dashboard with a sidebar on the left containing navigation links: 'Welcome', 'About you', 'About your work', 'Your address details', 'Your properties', 'Your mortgages', 'About your investments' (highlighted), and 'Your superannuation'. The main content area is titled 'About your investments' and features a blue 'Add investment' button at the top. Below this is a table with two columns: 'Description' and 'Owner'. The table lists two investments: 'CBA Savings' owned by 'Syarra' for '\$10,000', and 'BHP Shares' owned by 'Syarra' for '\$20,000'. At the bottom of the main area, there are three buttons: 'Back', 'Save & exit', and 'Save & continue' (which is highlighted with a red box).

Description	Owner
CBA Savings	Syarra \$10,000
BHP Shares	Syarra \$20,000

Next is Your superannuation. Click on Tell us about your superannuation.

The screenshot shows the 'Your superannuation' section of the dashboard. The sidebar is the same as the previous screenshot, but 'Your superannuation' is now highlighted. The main content area is titled 'Your superannuation' and features a palm tree icon. Below the icon, the text reads 'Tell us about your retirement' and 'Next we will ask about your retirement and your superannuation.' There are two buttons: 'Tell us about your superannuation' (highlighted with a red box) and 'I do not have a superannuation'. At the bottom, there is a link that says 'Skip to next section'.

Click on Add superannuation to complete these details.

The screenshot shows the 'Superannuation' section of the dashboard. The sidebar is the same as the previous screenshots, but 'About your work' is now highlighted. The main content area is titled 'Superannuation' and features a blue bar with the text 'Add superannuation' (highlighted with a red box).

To move onto the next section, click on Save & continue.

Welcome

About you

About your work

Your address details

Your properties

Your mortgages

About your investments

Superannuation

Add superannuation

Superannuation	Balance
REST Super Accumulation	\$350,000.00 Syarra

Back

Save & exit

Save & continue

Next is Other income. Click on Tell us about your income. Complete this section and when finished click on Save & continue.

Welcome

About you

About your work

Your address details


Your properties

Your mortgages

About your investments

Your superannuation

Other income



Tell us about any income you receive.

You have already helped us by adding details of your occupation, properties or other assets that you hold. Here, we ask you about any other income you may receive such as dividends, bonuses or commission.

Tell us about your income

[Skip to next section](#)

Next is About your expenses. Click on Tell us about your expenses.

Welcome

About you

About your work


Your address details

Your properties

Your mortgages

About your investments

About your expenses



Tell us about your expenses

You have already helped us gather some information about your income. Next there is an opportunity to add additional expenditure.

Tell us about your expenses

[Skip to next section](#)

Picks up the mortgage repayments already added in the fact find. Click on Add expense to add in more. Click on Save & continue when finished.

Welcome

- About you
- About your work
- Your address details
- Your properties
- Your mortgages
- About your investments
- Your superannuation
- Other income
- About your expenses

Your expenses

Total expenses
\$3,000.00

Monthly Annually

Add expense

Debt-Long Term	\$3,000.00
Mortgage Payments	\$3,000.00
Syarra	

Back Save & exit Save & continue

You have now finished completing the Onboarding Fact Find. Click Submit Report.

That's it!

You've given us a great start into discovering your financial situation. Please review what you've entered and when you are ready, send us your report.

Sections

- [About you](#)
- [About your work](#)
- [Your address details](#)
- [Your properties](#)
- [Your mortgages](#)
- [About your investments](#)
- [Your superannuation](#)
- [Other income](#)
- [About your expenses](#)

Save & exit Submit report

This will then be sent back to the Adviser and your details will be updated in XPlan.

