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:** Syarra Xplan5
- **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.

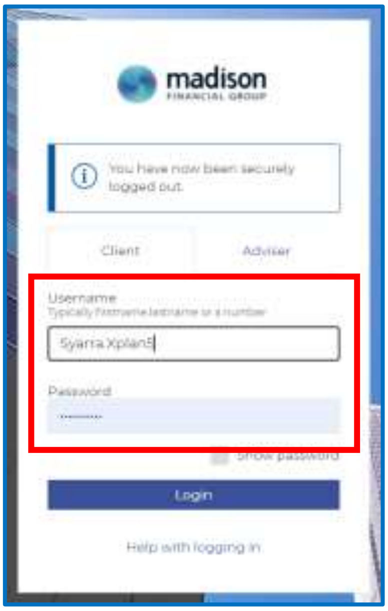
You can access your Portal by navigating to the login page and entering your login details below:

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

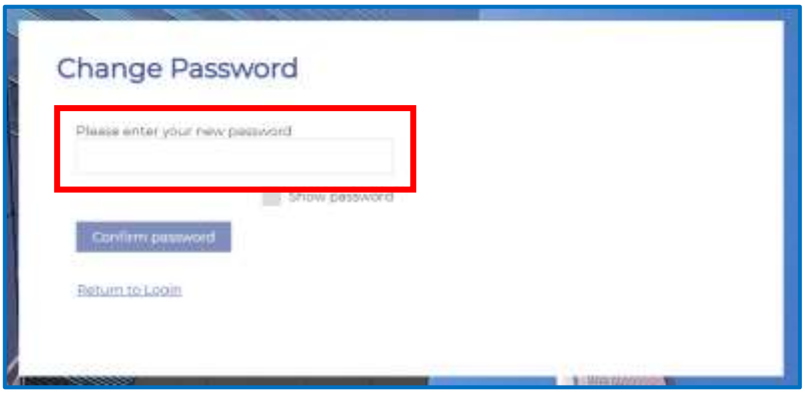
Note:
You will need to change your password this can be done once you have logged in, under 'My Account'.

Regards,

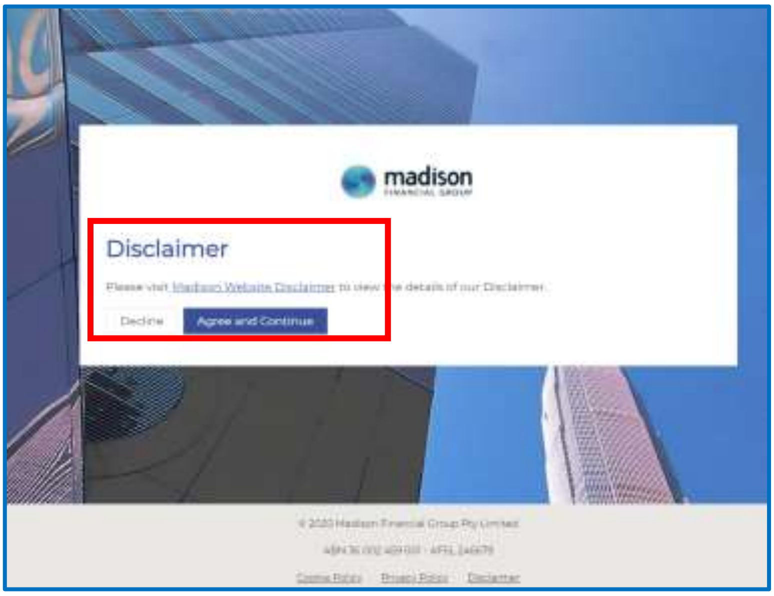
By clicking on the link this will take you to the practice’s Client Portal login page.



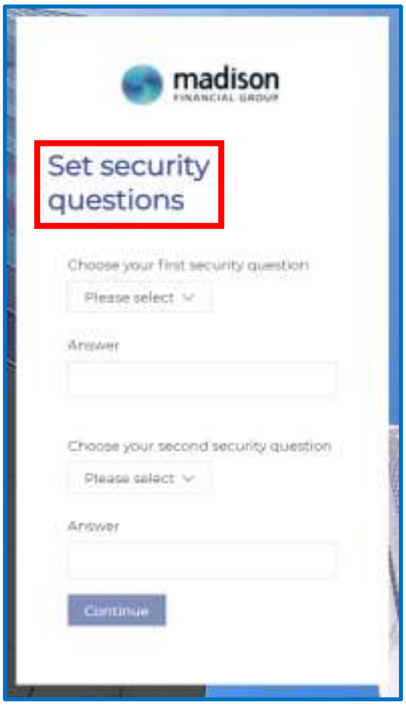
Then when you login you are prompted to change your password for Client Portal.



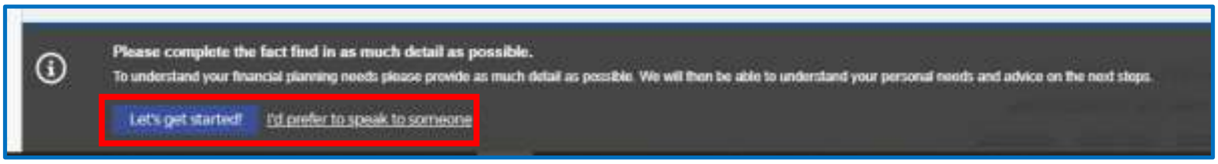
The next screen that will display for you is the disclaimer screen for you to Agree and Continue.



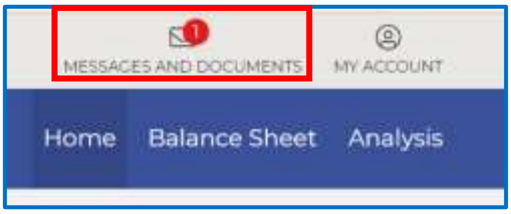
Then you are asked to complete two security questions.



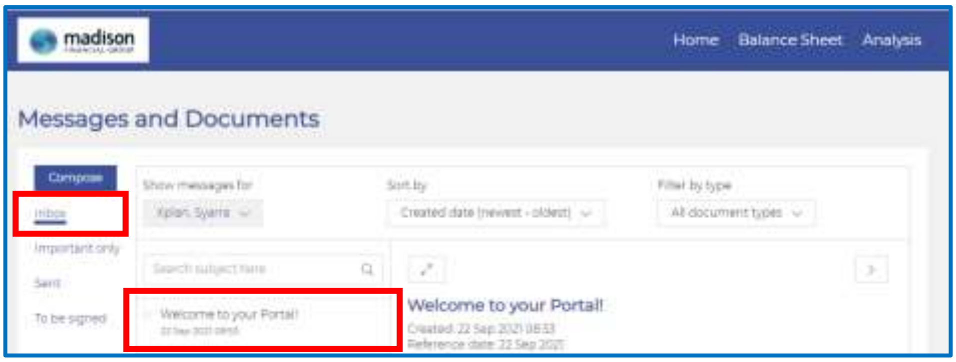
When you arrive at the landing page you will see the ability down along the bottom of the screen to complete the fact find (if this has been enabled for you). The client can click on the **Let's get started!** or they can click on **I'd prefer to speak to someone** and that will notify your adviser.



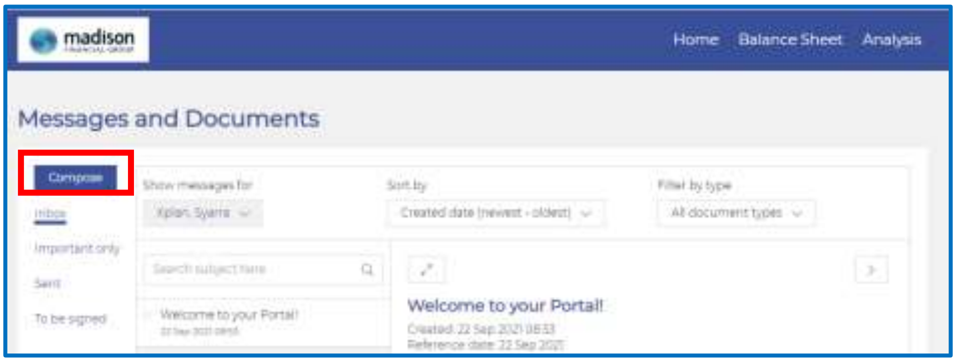
You will also see up in the right hand corner your Messages and Documents will have a red 1 showing.



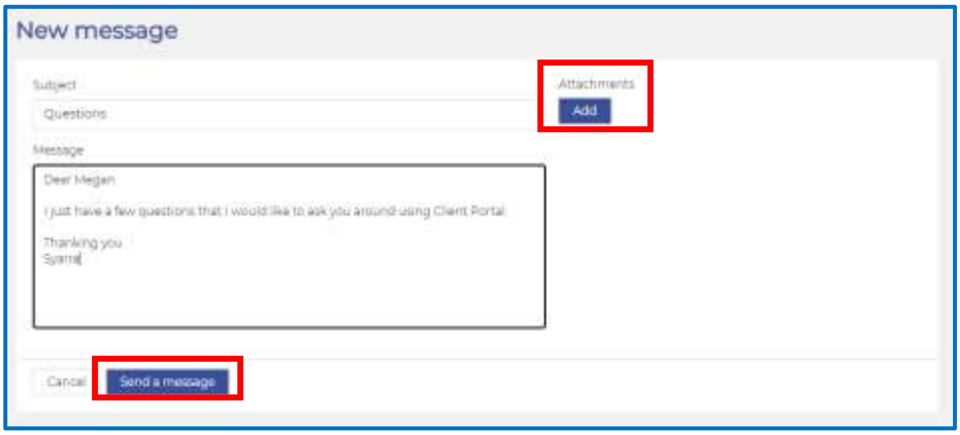
If you click on this, you will see a copy of the second email that was sent to you with your Password and link to login into Client Portal.



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).

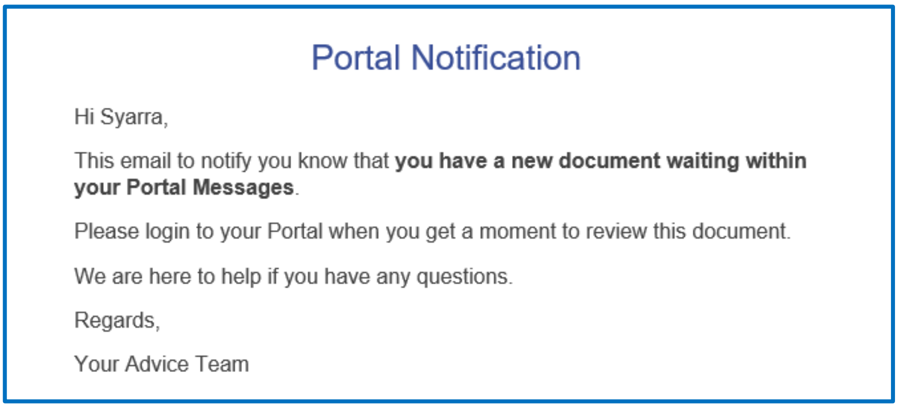


Then a New Message screen appears for you to add in your Message. You will also note that you can add in Attachments. When you are ready you can click on Send a Message and the adviser will be notified that you have sent a message, and this will be sorted in XPlan as a file note as well as in your Sent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



Portal Notification

Hi Syarra,

This email to notify you know that **you have a new document waiting within your Portal Messages**.

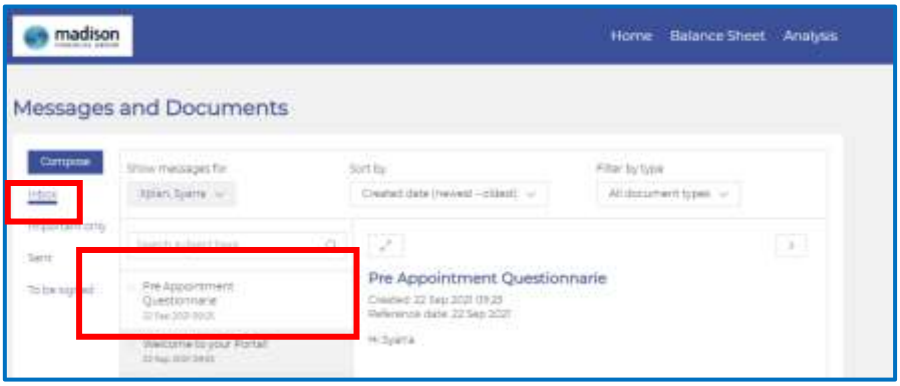
Please login to your Portal when you get a moment to review this document.

We are here to help if you have any questions.

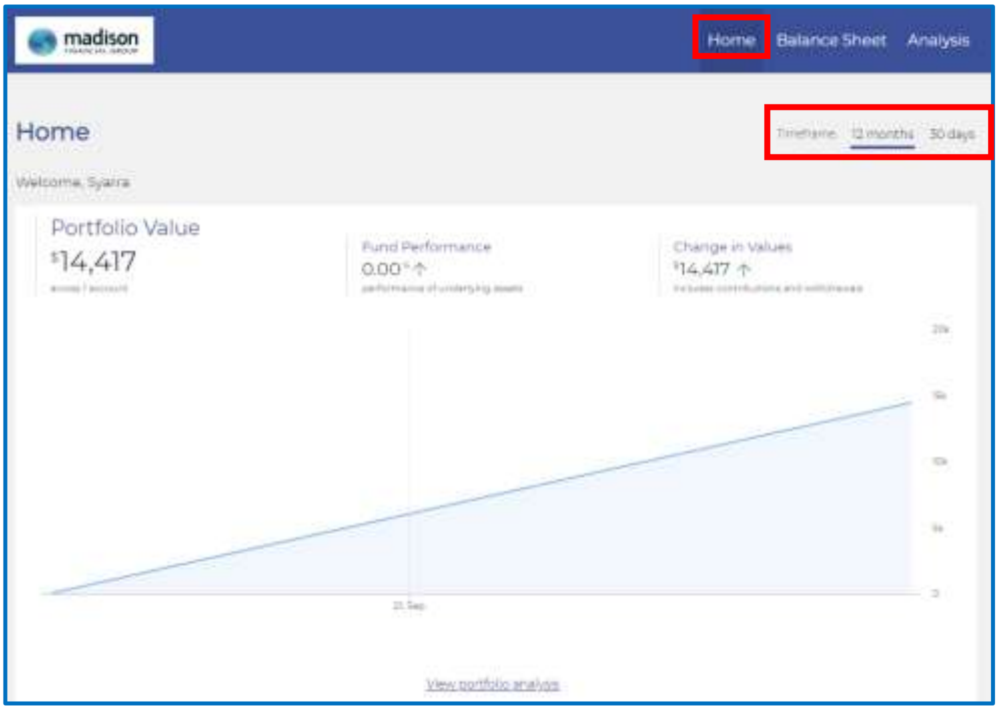
Regards,

Your Advice Team

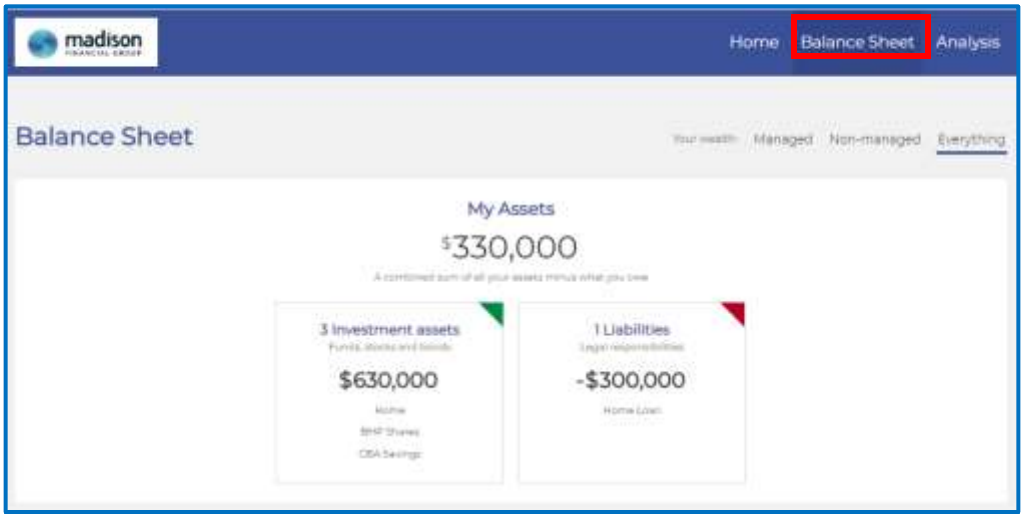
Once again you can login back into Client Poral and under Messages and Documents you will see the new message.

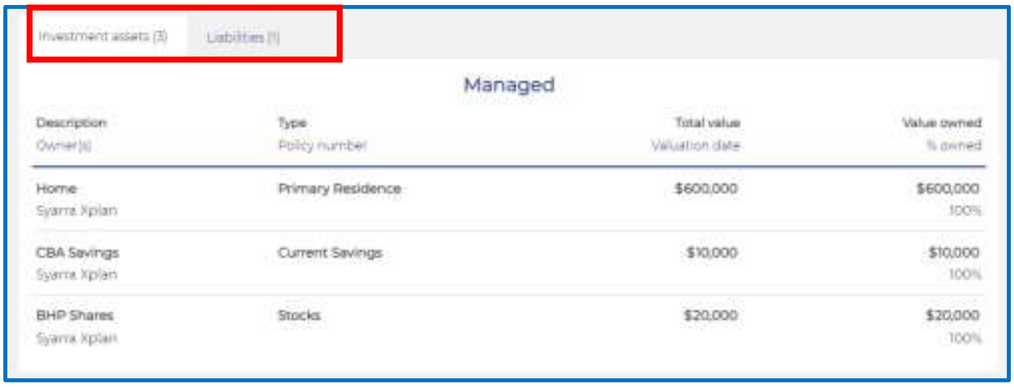


If you click on the **Home** button this will take you to the landing page of Client Portal. This will display your Portfolio Value and how it has tracked along with Fund Performance and the Change in Value over the last 12 months. You can change this view by clicking on 30 days as the Timeframe.

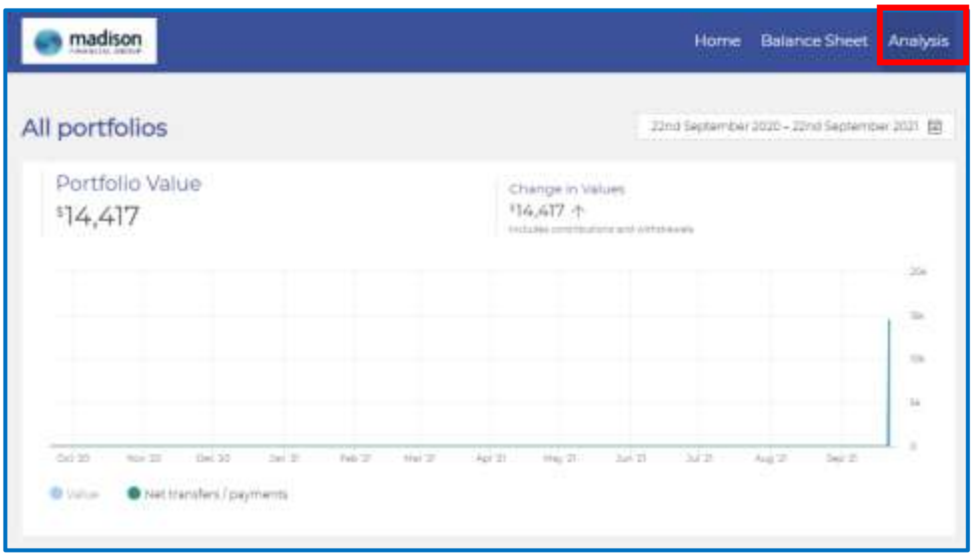


Next to the Home button is the Balance Sheet. You can break down what you can see within this screen.

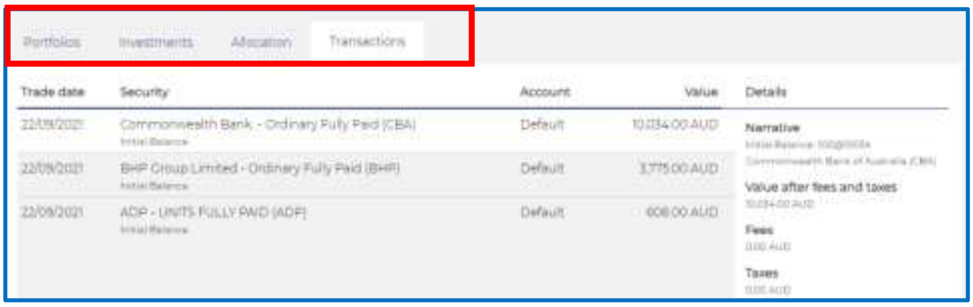




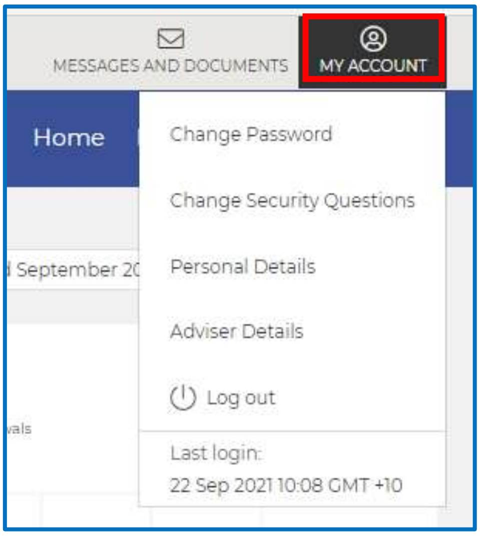
The last screen is your Analysis. Which you can change the date range and the graph is interactive with you.



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

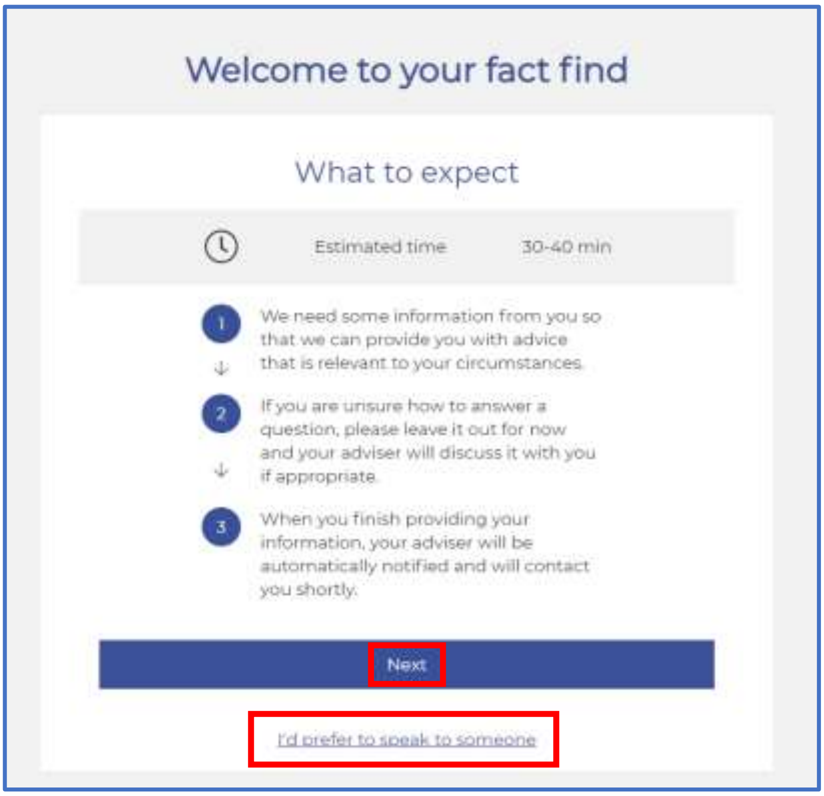


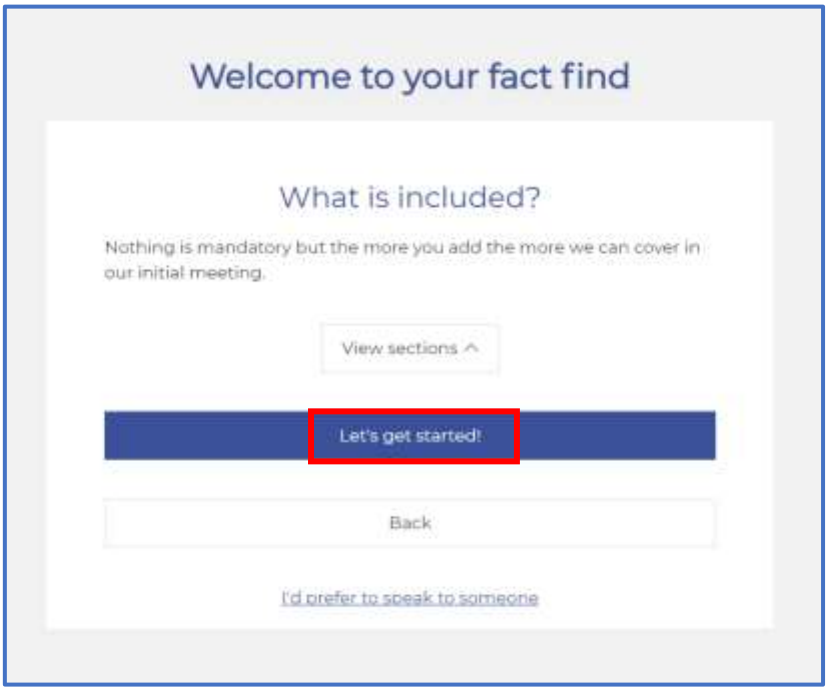
When you are ready to Logout or you wish to change your details you can click on My Account up in the right hand corner and a drop down menu will appear.



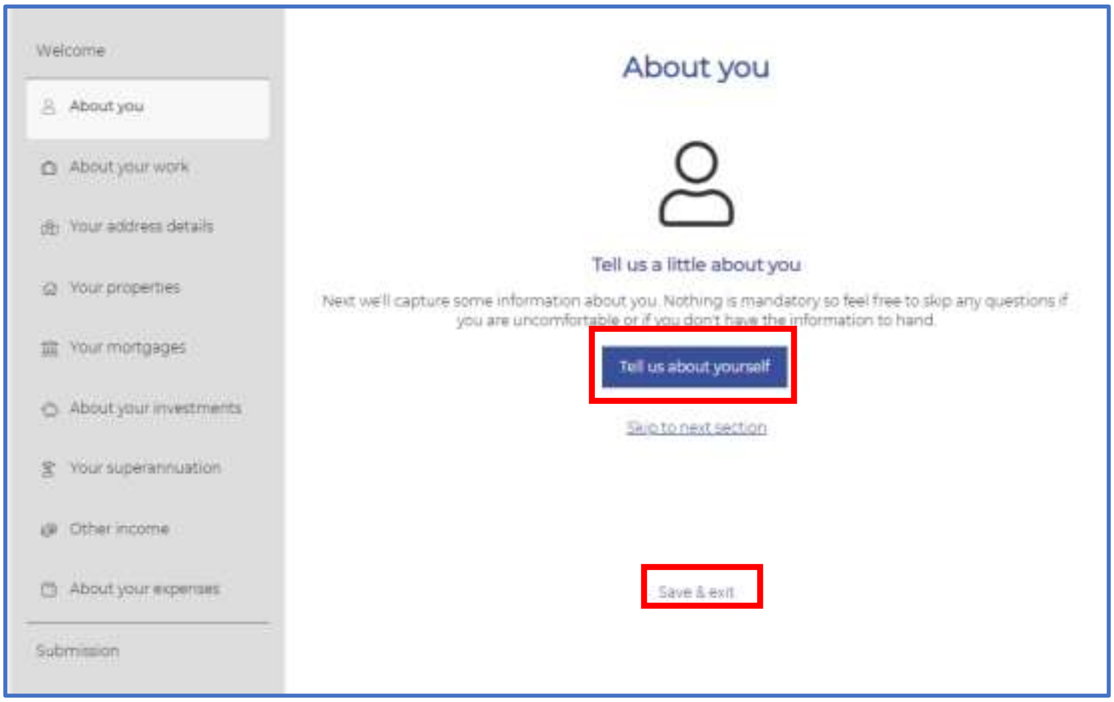
<u>If the Onboarding Fact Find has been enabled for you, you will need to complete it.</u>

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.

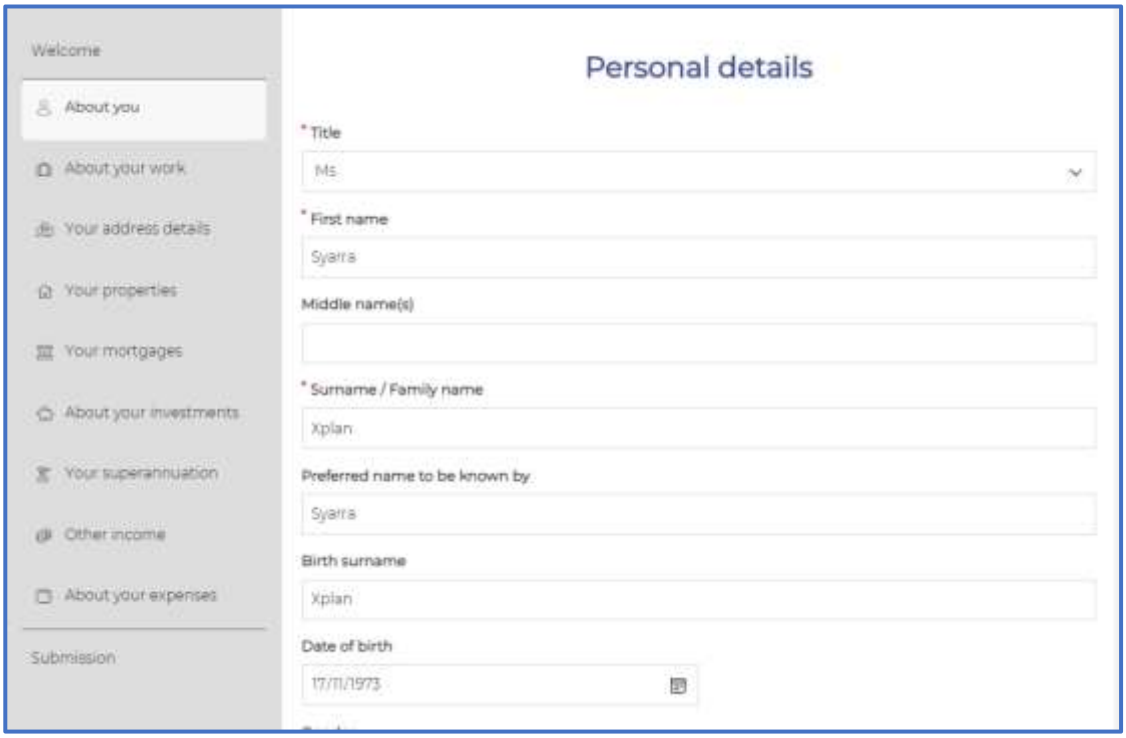




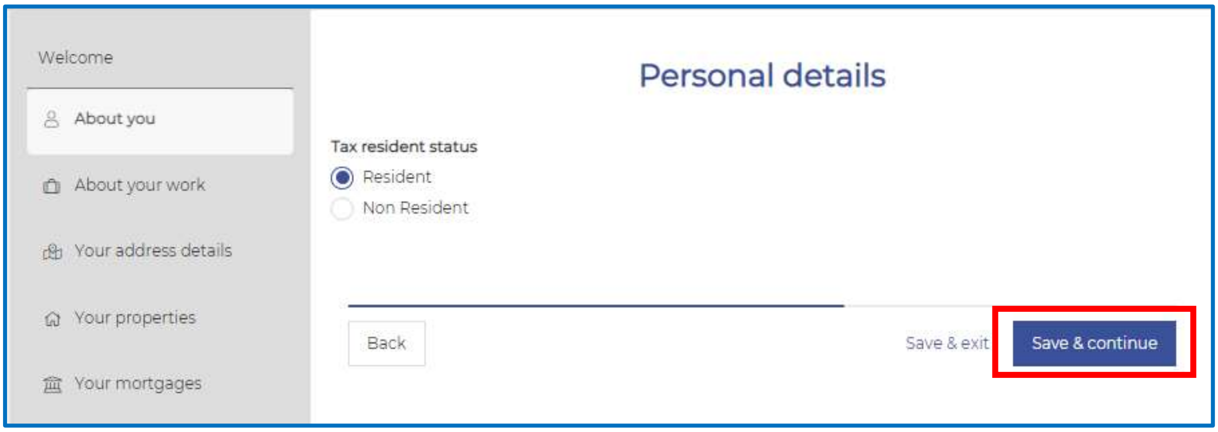
You can go between sections and can save and exit at any stage of the fact find onboarding process.



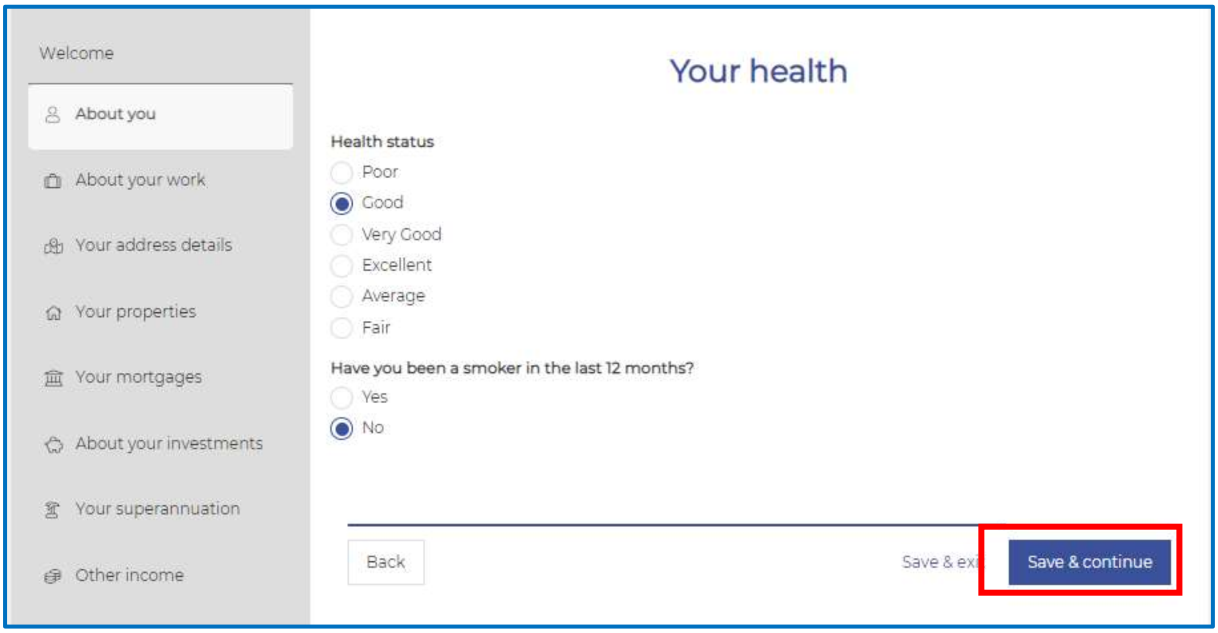
Personal Details are as follows that are captured in Client Portal. Once completed click on Save & continue.



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

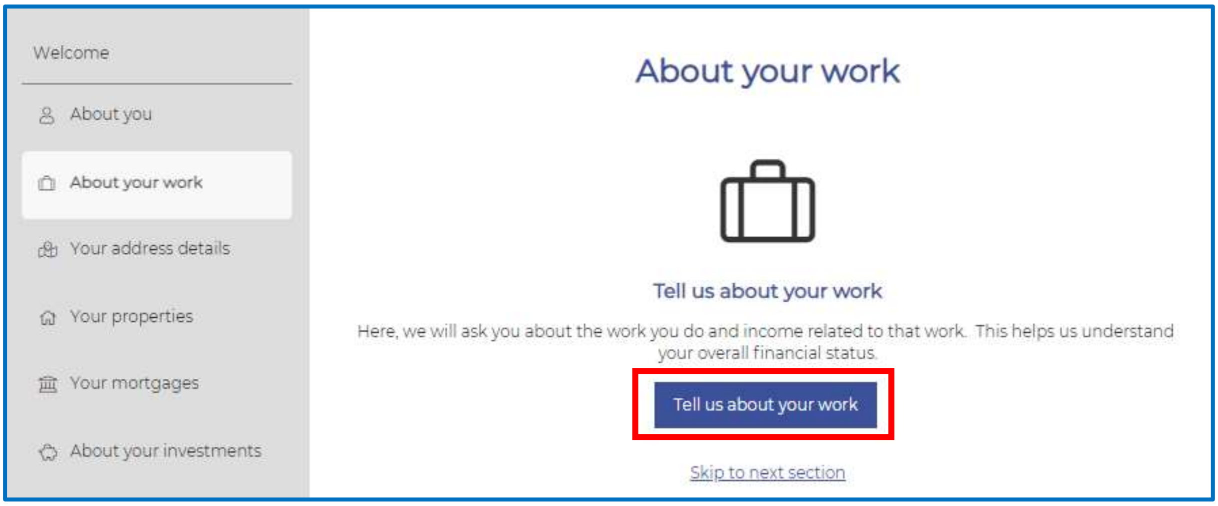


Your Health is the next section of the onboarding Fact Find. Click on Save & continue.

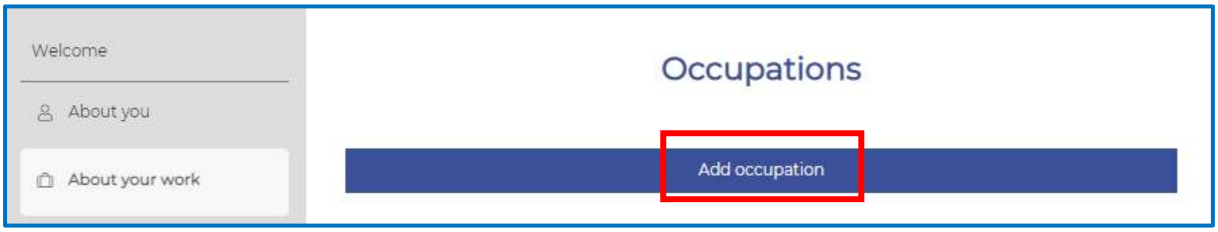


Contact details are next and they are just confirming the details you have completed. Save & continue.

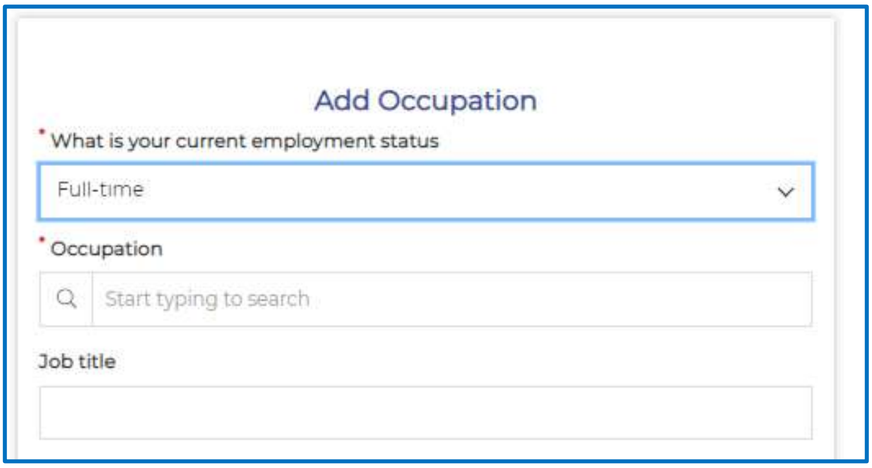
About your work is next. Click on Tell us about your work to complete this section.



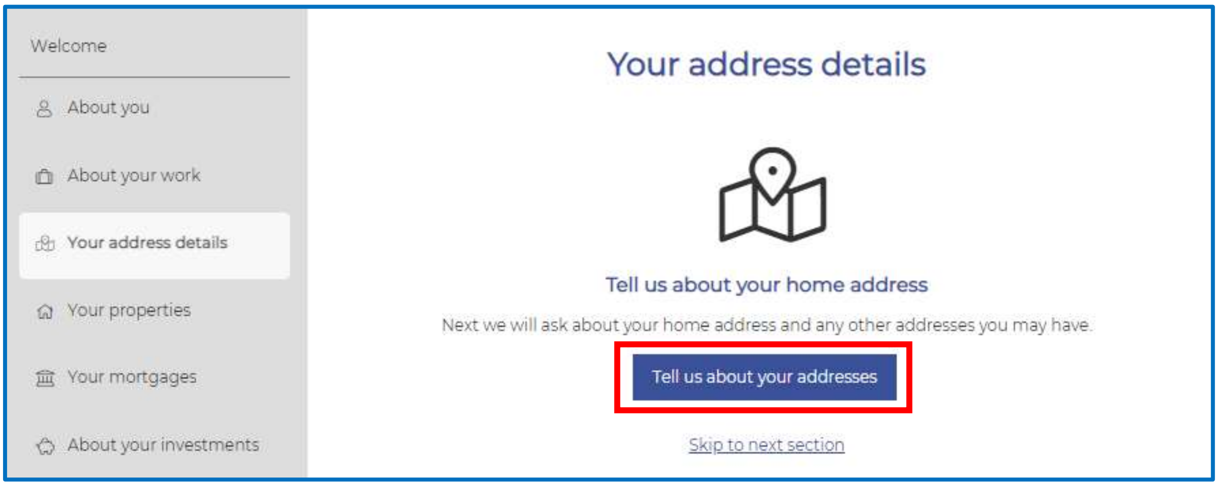
Work Details click on Add occupation and this opens a new screen for you to complete. Click Save & continue.



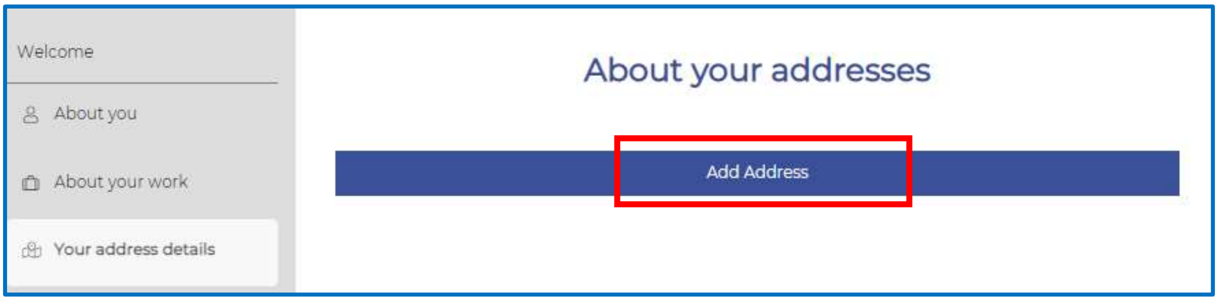
This field will expand. Complete the fields and click on Save & continue.



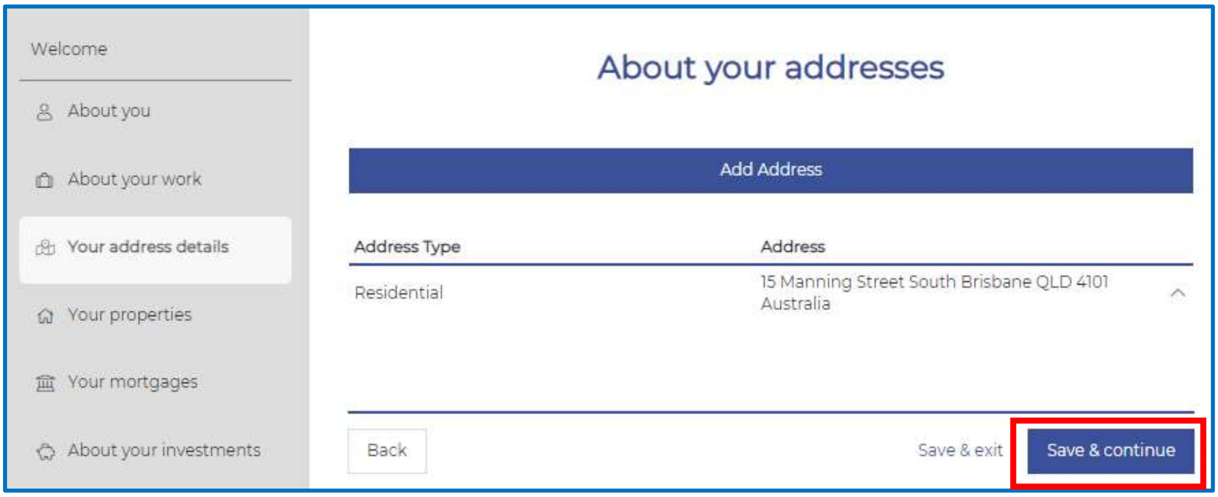
The next section is Your address details. Click on Tell us about your work to complete this section.



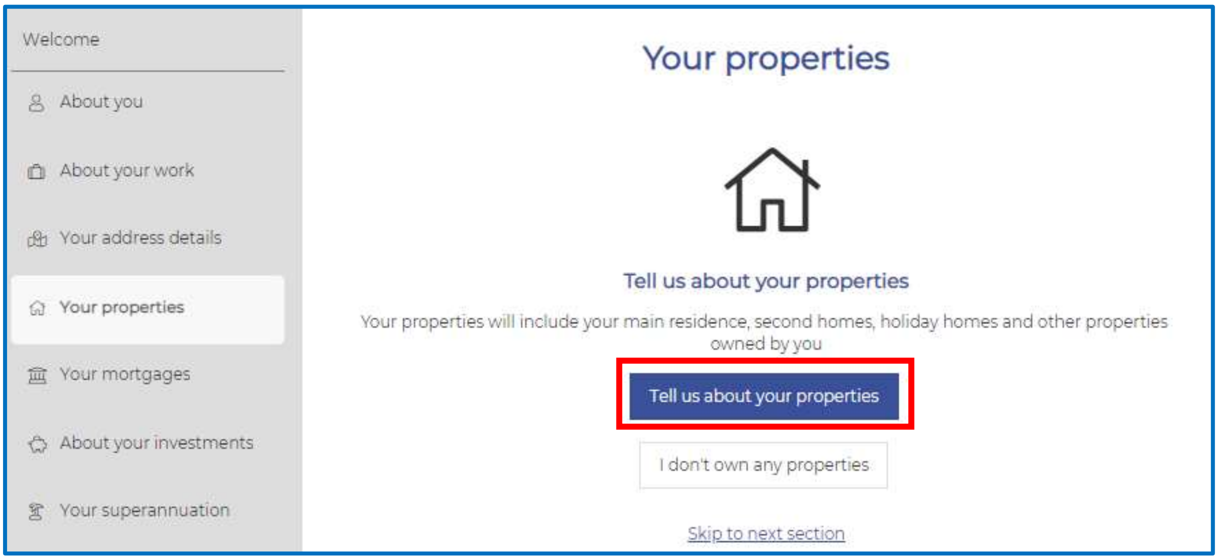
Click on Add Address and complete this section. Once finished click on Save & continue.



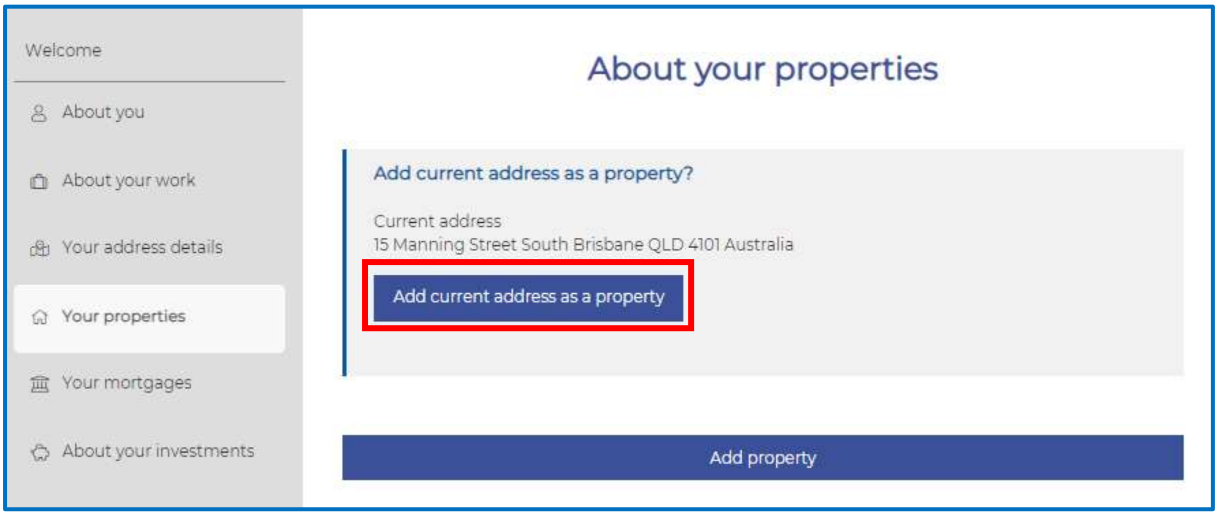
Once finished click on Save & continue.

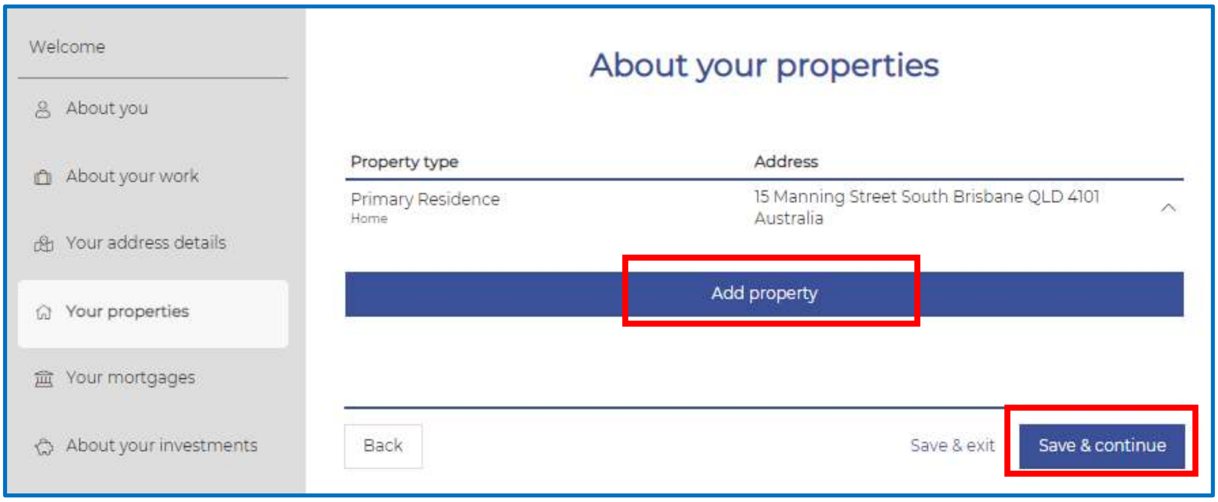


Your properties is next. Click on Tell us about your work to complete this section.

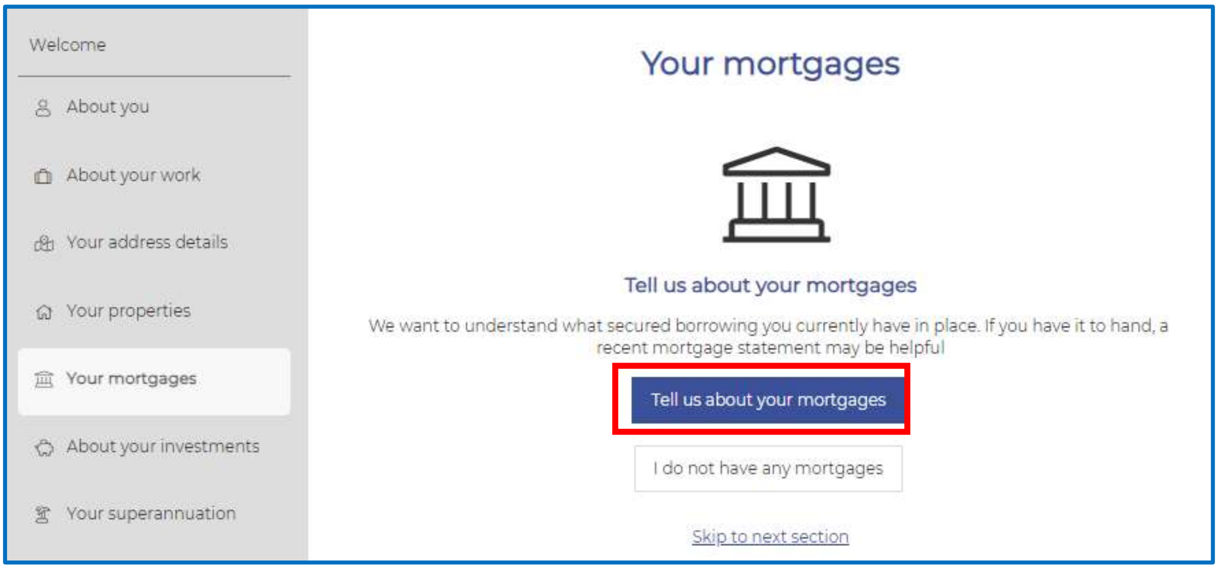


Click on Add current address as a property. This will add in this property. To add in an additional Property, click on Add Property. Once finished click Save & continue.

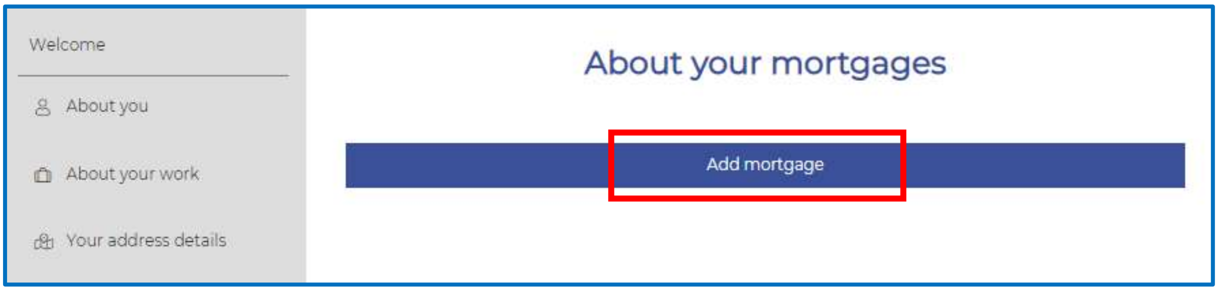


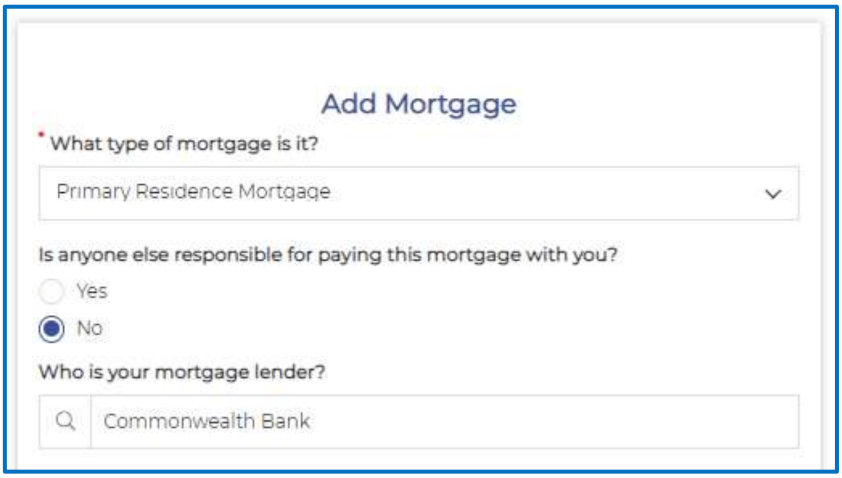


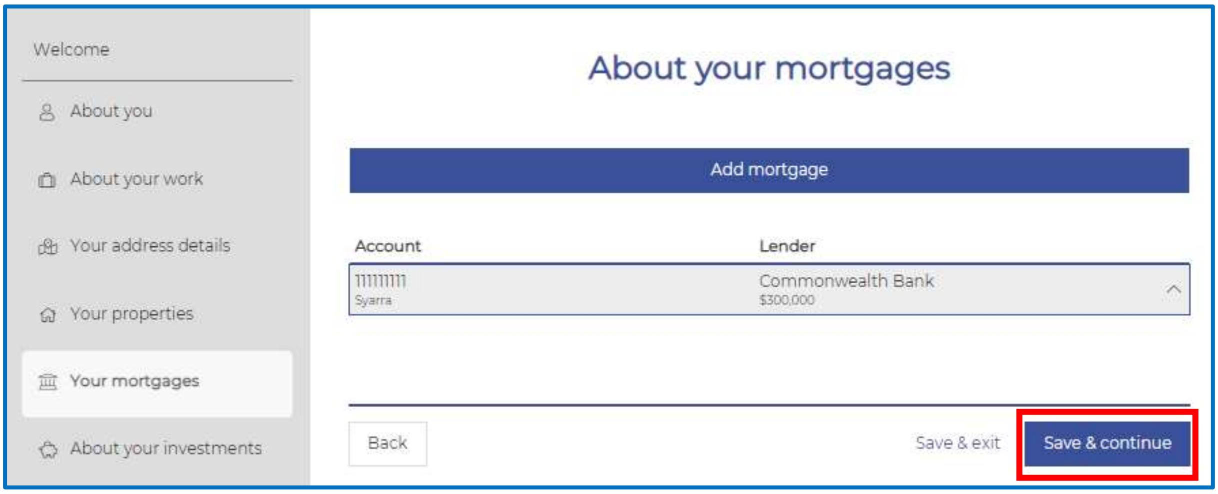
Next is Your mortgages. Click on Tell us about your mortgages.



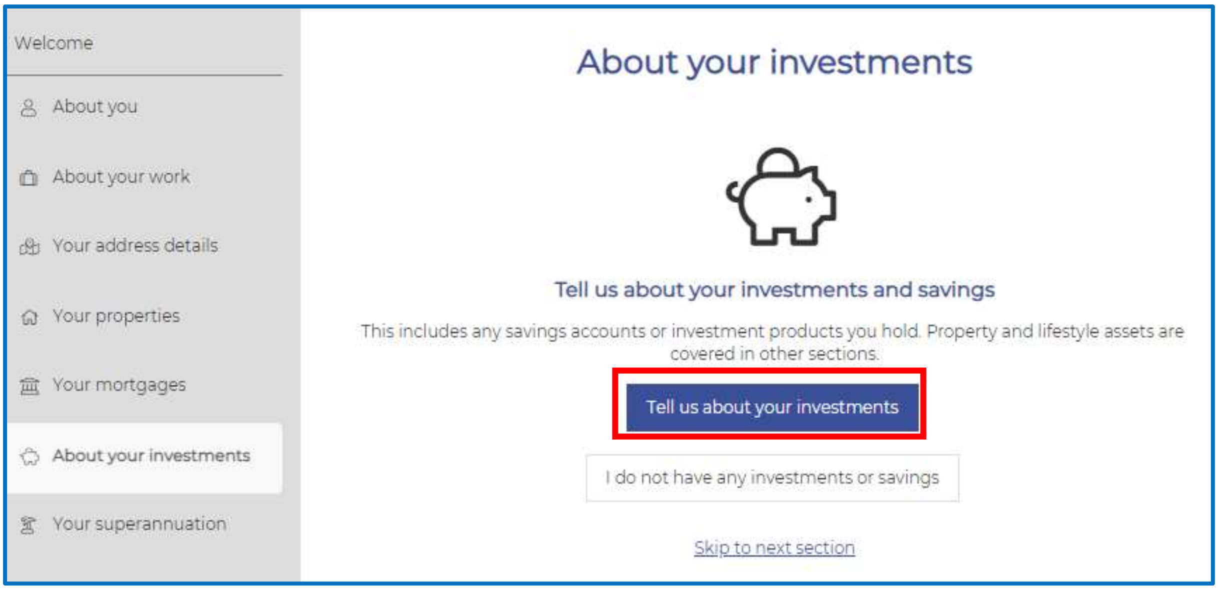
Click on Add mortgage. Add in this information and then click on Save & continue.



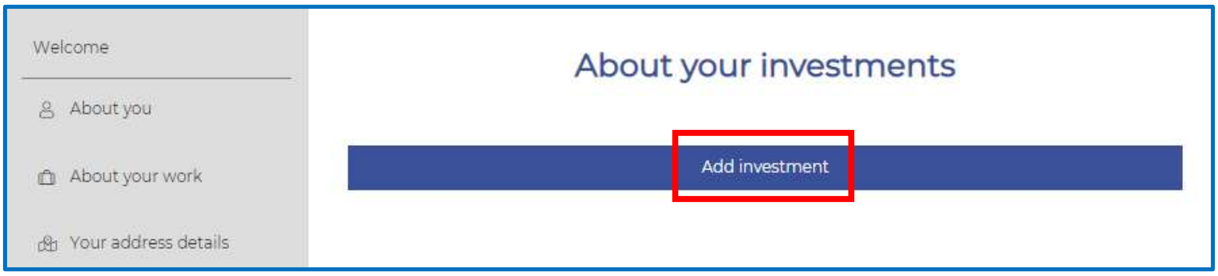




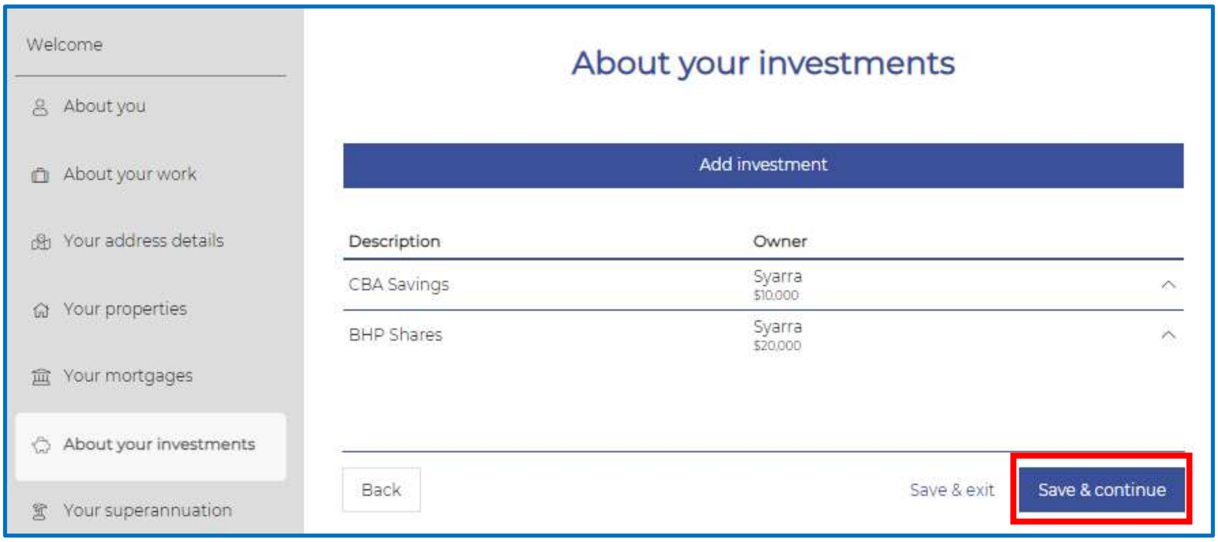
Next is About your investments. Click on Tell us about your mortgages.



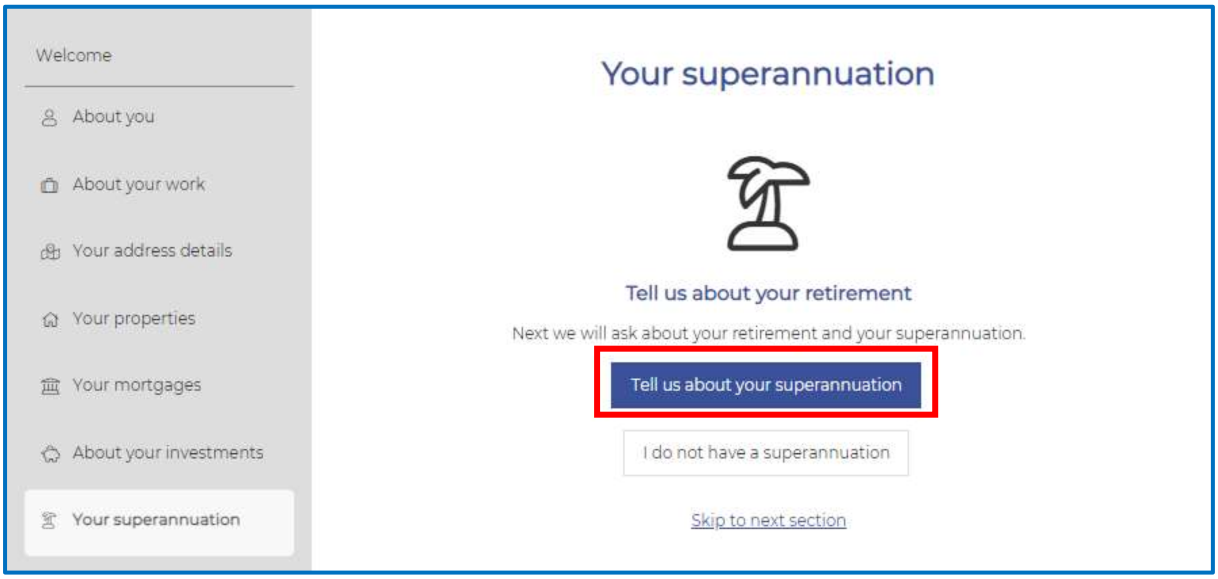
Click on Add investment. Once completed click on Save & continue.



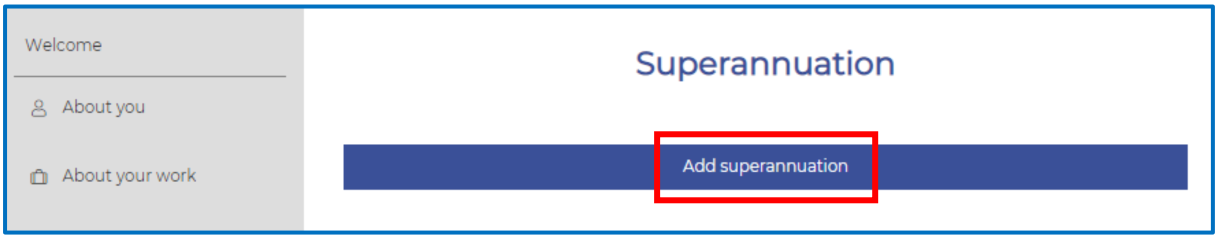
To move onto the next section, click on Save & continue.



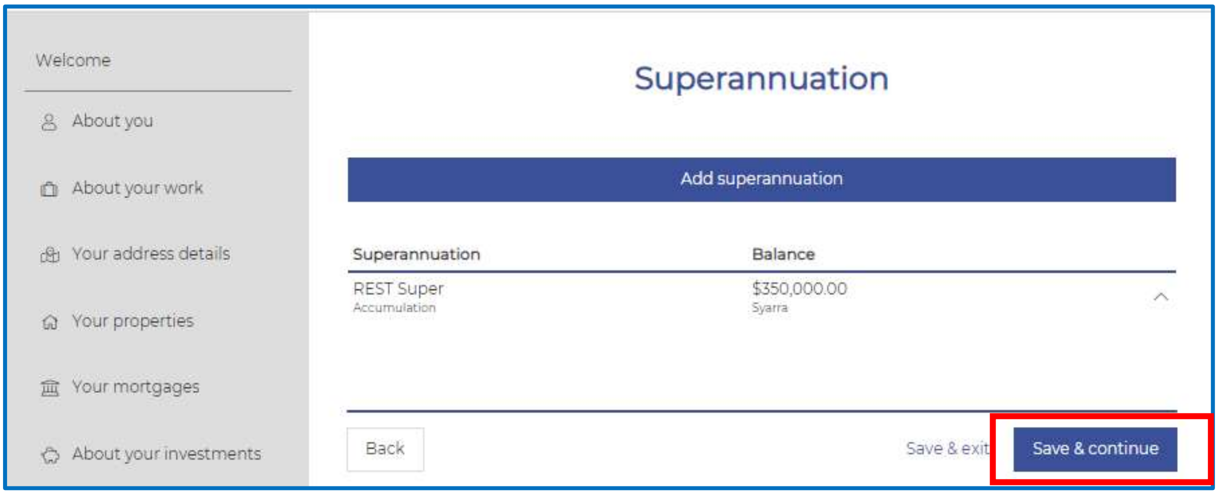
Next is Your superannuation. Click on Tell us about your superannuation.



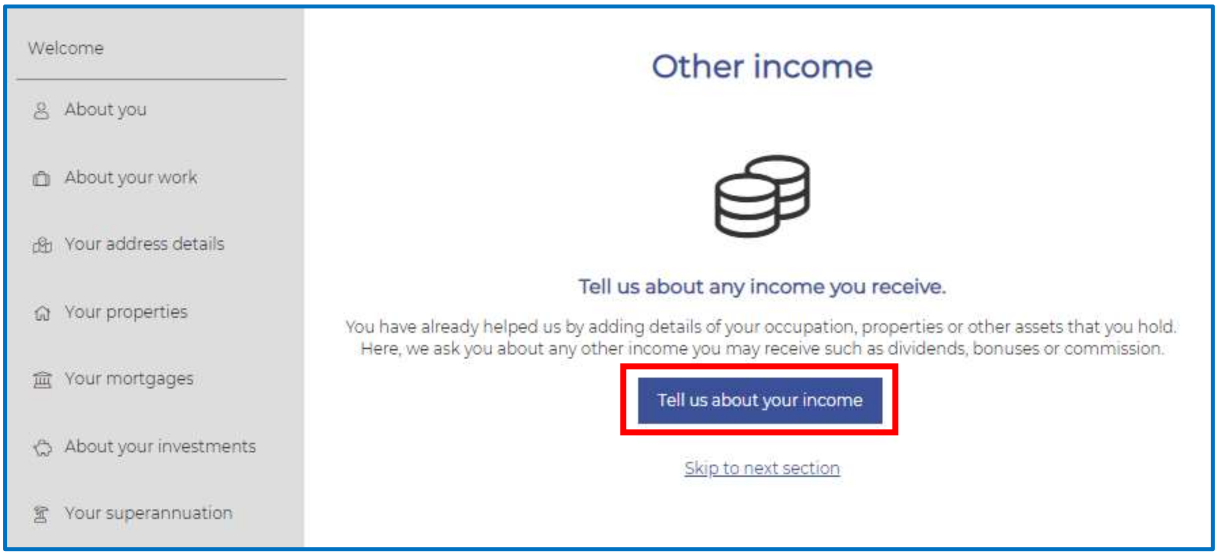
Click on Add superannuation to complete these details.



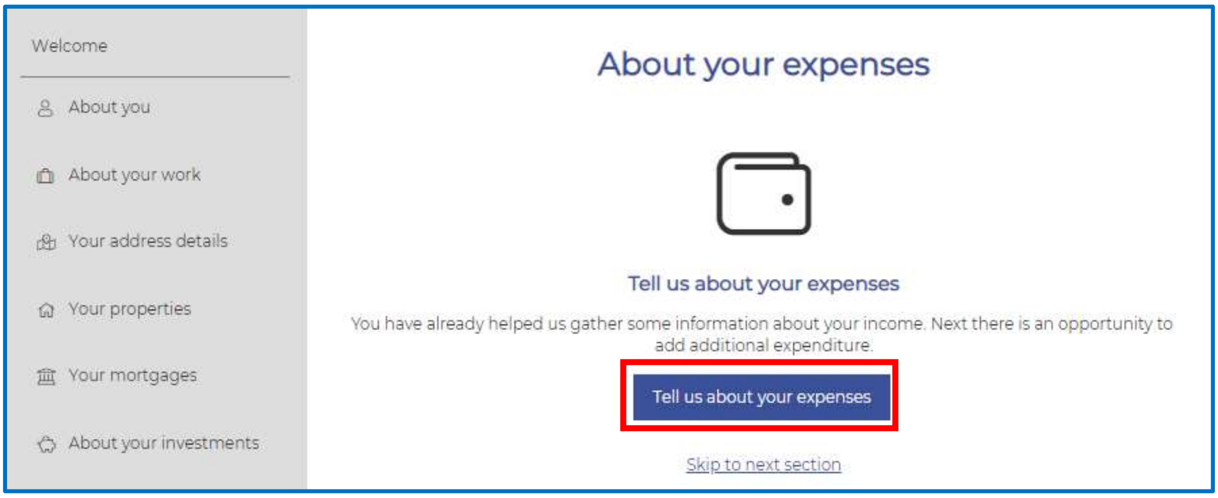
To move onto the next section, click on Save & continue.



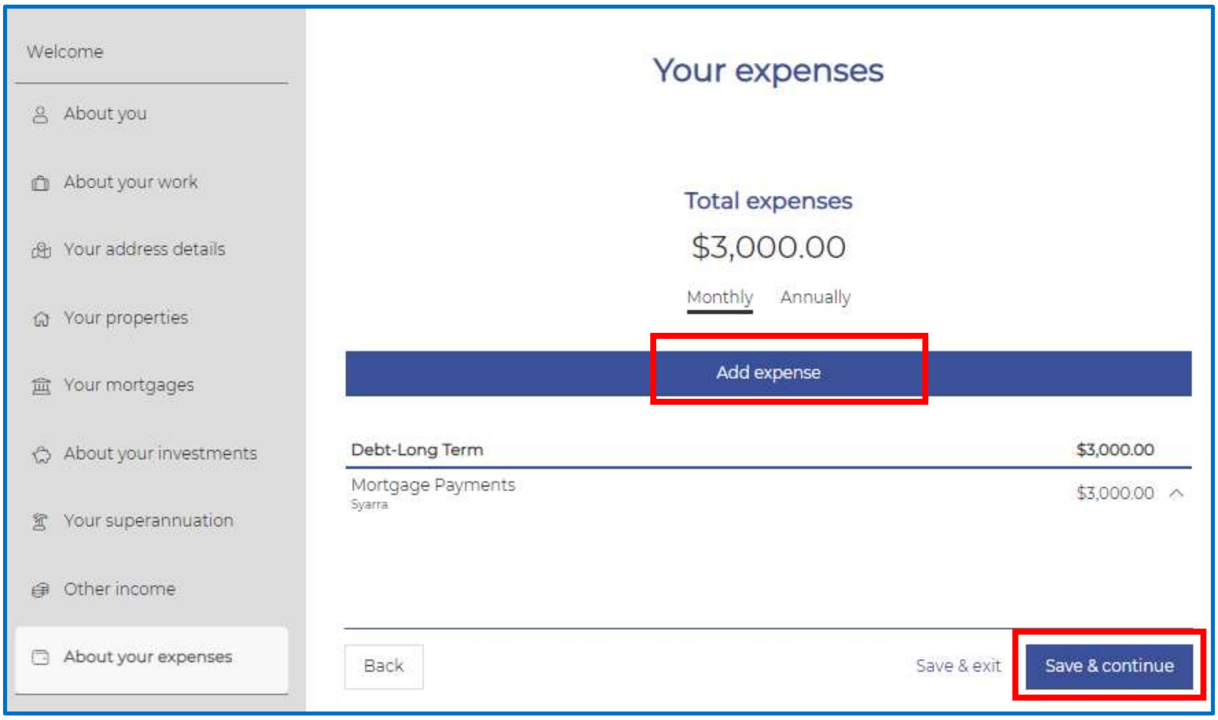
Next is Other income. Click on Tell us about your income. Complete this section and when finished click on Save & continue.



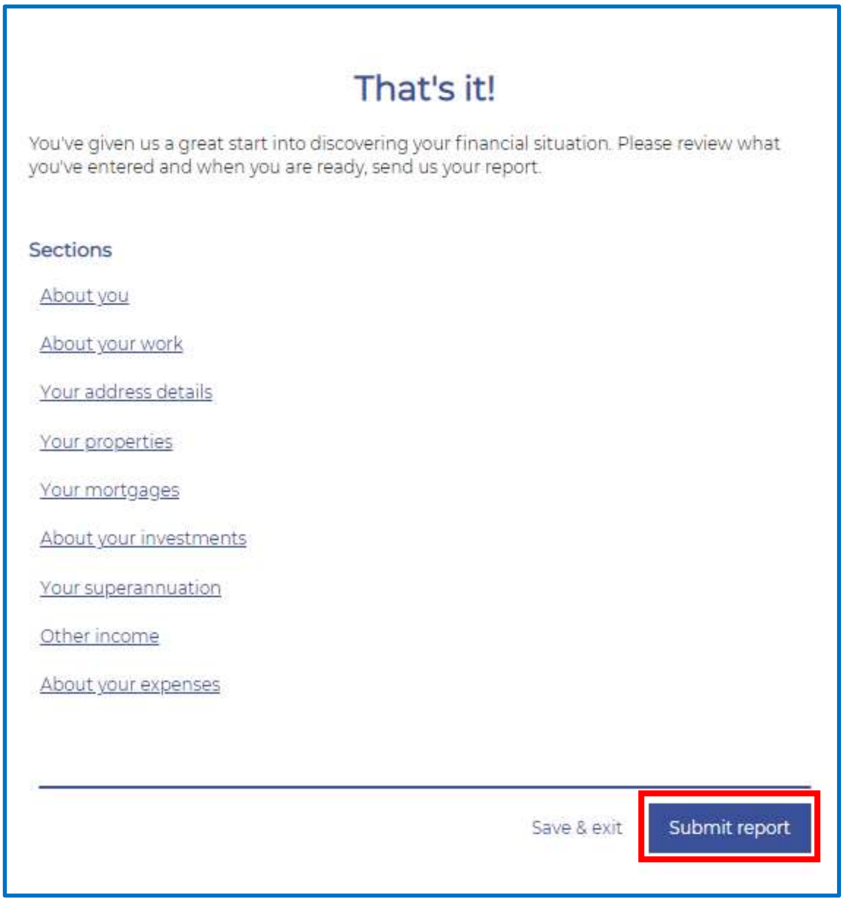
Next is About your expenses. Click on Tell us about your expenses.



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.



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



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