

Financial planning redefined

Your clients' financial world sorted

Manage your clients' entire financial world anytime, anywhere. From property, loans and super to wills, banking and tax, give your clients a personalised wealth portal to help them get their finances **sorted**.



Boost your brand

Enhance your offering with a customisable personal wealth portal. Add your logo then configure the platform to suit your needs and those of your clients.



Real-time data feeds

Thanks to our partner integrations your customers' financial data – including bank accounts, super, insurance and property value – is always up to date.



One-stop destination

Move to the cloud and become a one-stop destination for your clients and their finances. Log-in online or take it on the go with our mobile app.



Limitless opportunities

We make it easy for you to engage with your clients and increase your revenue with digital document signing, automated engagement tools and powerful data at your fingertips.

Book a free demo today.

Visit www.myprosperity.com.au and stop by booth 21 for a chat with our amazing team to see how we can help your business grow.



Booth 21

