

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

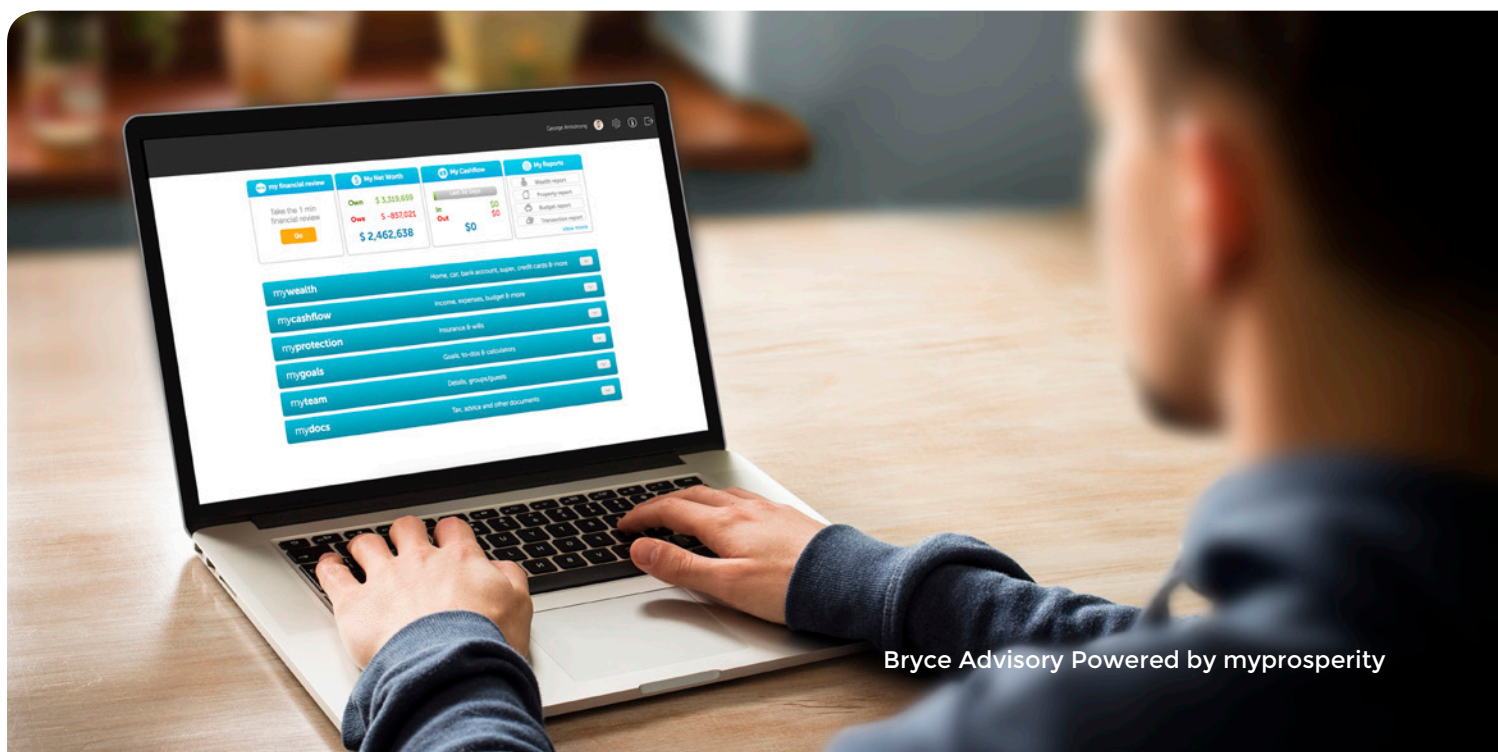
Say goodbye to spreadsheets. Take control with instant budgets created around your spending and set limits on categories.

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.