



PROVIDENT

FINANCIAL SERVICES

Inspiring your **Enjoy Factor** moments

# Money Management: Client Onboarding

## User Guide for Apple (iOS) & Android users

Money Partner App – powered by Frollo |v2 March 2023

## 1. Introduction

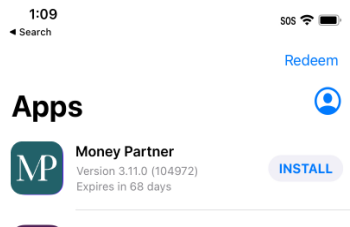
### 1.1. Overview

This is a step-by-step guide on how to onboard to the Money Partner app. Before you start, ensure you have completed the checklist below:

- Obtain the unique adviser code from your Financial Adviser or Mortgage broker.
- Apple users: Ensure you have iOS version 13 or above installed on your Apple device
- Android users: Ensure you have Android Pie (known as Android 9) or above installed on your Android device

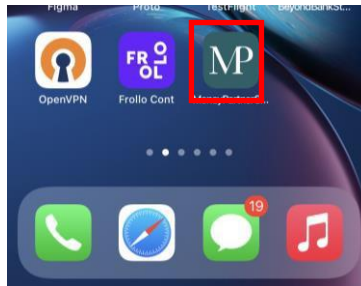
## 2. Installing the Money Partner App

1. In the App store / Google Play store, search for the Money Partner app
2. Install the Money Partner app on your device

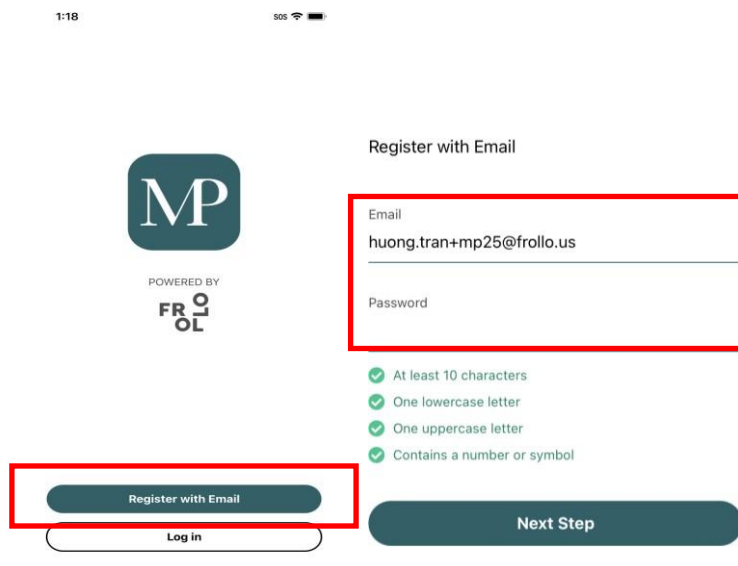


## 3. Register for the Money Partner App

1. Open the Money Partner App on your device



2. Click on "Register with email", enter your email and create a password



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POWERED BY FROLLO

Register with Email

Email  
huong.tran+mp25@frollo.us

Password

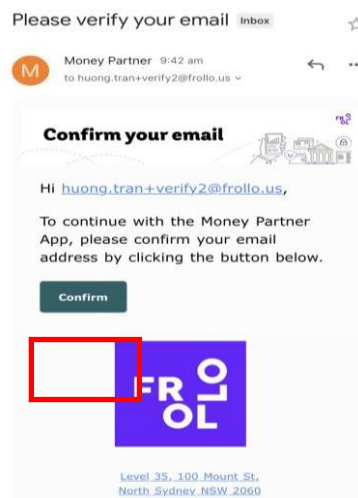
- ✓ At least 10 characters
- ✓ One lowercase letter
- ✓ One uppercase letter
- ✓ Contains a number or symbol

Register with Email

Log in

Next Step

3. Read and accept the terms and conditions
4. Verify your email address in the email account that you have registered with



5. Set up your privacy features: Biometrics (face ID) or passcode
6. Enter your personal details to complete the registration process
7. Enter the unique adviser code that links to your financial adviser (noting that the code is case sensitive) and click next

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#### Registration code

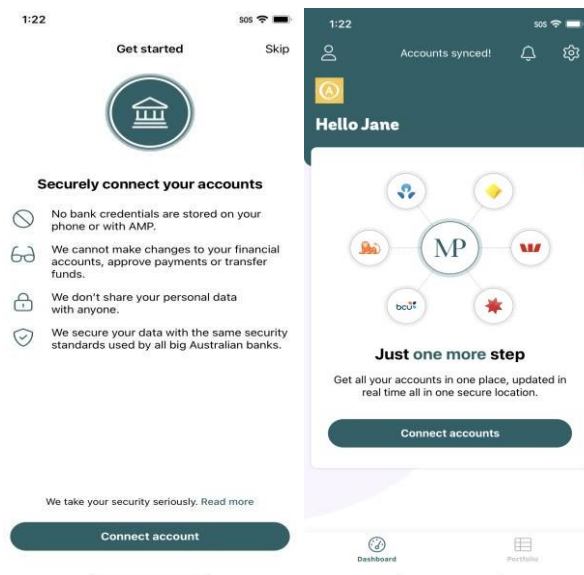
#### Enter your registration code

If you have not received a code, please contact your financial advisor or customer support at [support@amp.com.au](mailto:support@amp.com.au)

Registration code

Next

8. Link an account (optional) or skip and go to dashboard



You can link most banks in Australia using Consumer Data Right (CDR) data services. Additionally, you can link non-bank accounts using Yodlee screen-scraping or enter them manually.

For the full list of data providers please contact your financial adviser or mortgage broker.

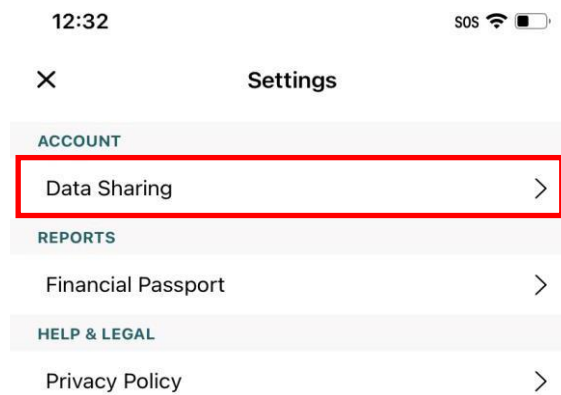
## 4. Disclosing your data to a trusted adviser

Once you have connected all your accounts, you can start disclosing your financial data to your financial adviser or mortgage broker.

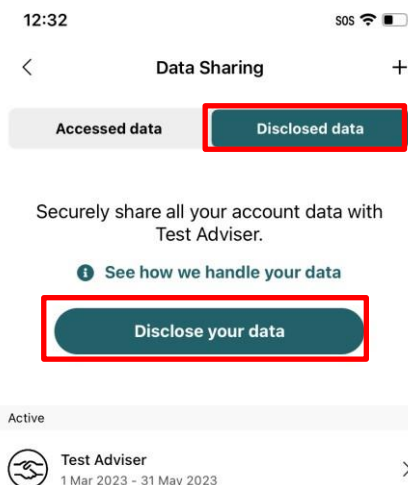
1. Go to Settings icon – top right-hand corner of your screen



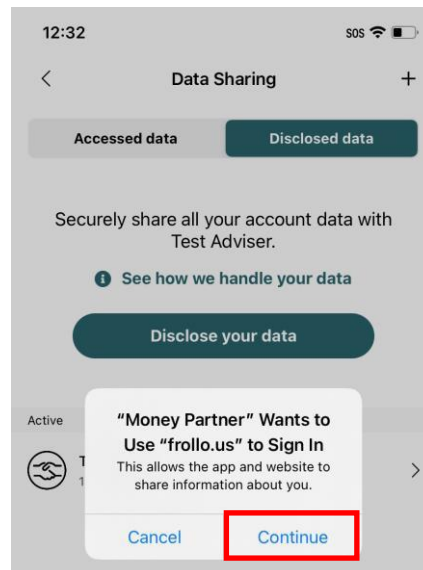
2. Select Data Sharing



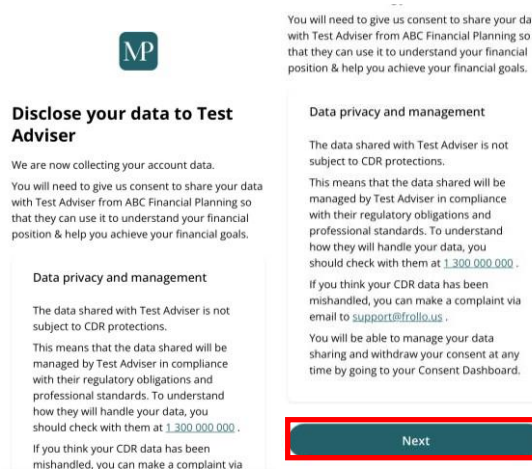
3. Click the Disclosed data menu option and click Disclose your data button



#### 4. Select Continue



#### 5. Read the terms and conditions and click Next



#### 6. Confirm the data to you'd like to disclose by clicking on the relevant options

##### 1 of 3: Confirm data you'd like to share

**Account balance details\*** ☒

We leverage this data to understand your financial position & help you achieve your financial goals.

Show full data list ☐

**Transaction details\*** ☒

We leverage this data to understand your financial position & help you achieve your financial goals.

Show full data list ☐

\*Required

7. Select a period for which you would like to disclose your data

### 2 of 3: Confirm disclosure period

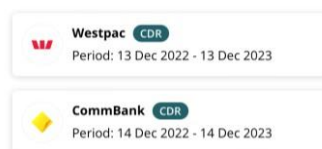
Your data will be shared **on an ongoing basis** with **Test Adviser** for the next:



We'll access data from the last **12 months** each time we disclose your data.

8. Confirm your selection by clicking I consent and Finish

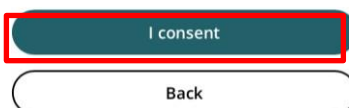
### 3 of 3: The data you share will come from the following banks



### You're done!

You have successfully disclosed your data with Test Adviser.

Do you consent to share your data with **Test Adviser**?



Your CDR data access preferences can be updated at any time by going to your [Consent Dashboard](#)

9. You can review all active and withdrawn consents in the Consent Dashboard

