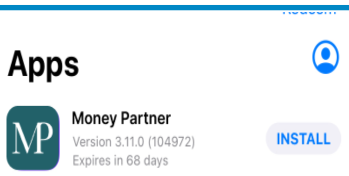
PROVIDENT

Money Management- installing the Money Partner app

Client Onboarding user guide for Apple & Andriod users

Quick reference guide to onboard to the Money Partner app

1 Open App store /Google Play store > search for **Money Partner app** > Install **app**



2 Open app > Click on **Register with email** > Enter your **email** > create a **password** > **Verify email** in the email account that you have registered with

3 Set up **privacy features**: Biometrics (FaceID) or passcode > enter **personal details** to complete registration

4 Enter the **unique adviser code** that links to your financial adviser or mortgage broker (noting code is case sensitive)

5 Link your **accounts** > Go to **dashboard** to see your linked accounts

6 Go to **settings** in the Money Partner app > Click **Data sharing** > Click **Disclosed data** menu option > Click **Disclose your data** button > Select data to disclose > Select period to disclose your data > **Confirm**

7 You can review all active and withdrawn consents in the **Consent Dashboard**

For detailed instructions and screen shots, please refer to the Client onboarding user guide