Welcome to the FPD Client Portal

FPD

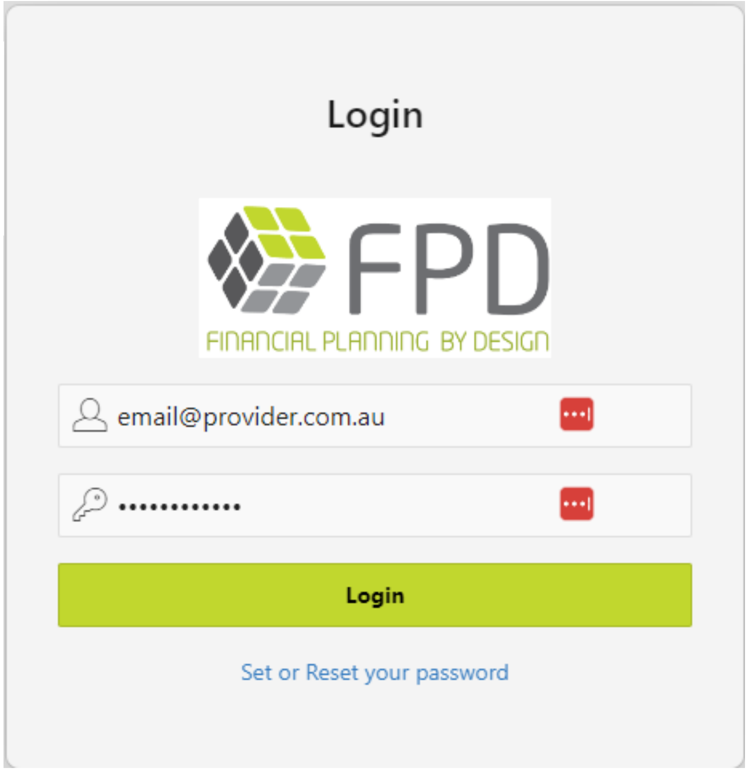
FINANCIAL PLANNING BY DESIGN

What is the FPD Client Portal?

- The FPD client portal is a safe and secure way of working with one another.
- It enables us to provide one another with information in a secure, encrypted environment
- It enables you to retain all your “financial life” in one place, storing documents, reviewing your position and booking appointments
- It doesn’t replace our conversations, meetings or chats that we have, but enhances our relationship with a level of security and visibility

How do I login to the FPD Client Portal?

Log in to the Client Portal with log in details emailed



If you are new to the portal click on Set your password to set your password & access the portal

What can I do on the FPD Client Portal?

Meeting Preparation

Welcome Joe and Mary

- Home
- Documents
- Service
- Financial projections
- **Meeting preparation**

Hello Joe and Mary

Welcome to the FPD Client Portal.

In order for us to maximise our time together, this enables you to provide us with information prior to the appointment.

If you are considering joining FPD, the portal can be used to provide some initial thoughts on what you are looking to achieve and provide some high level information.

If you are already an FPD client, this portal can be used to update any changes to your situation, update goals and tick off the achievements.

All information provided and documents uploaded are done so via a secure connection in real time.

If you have any questions, please contact our team on 1300 014 368.

We look forward to meeting with you

Regards Mathew

View important information

View important advice information about;

1. Who we represent
2. What services we offer
3. What we charge
4. How we treat your privacy
5. Information to provide

Please read

Financial Services Guide Part One	Version 1.1	Dated 1-May-2022	View
Financial Services Guide Part Two	Version 1.1	Dated 1-May-2022	View
Privacy Policy	Version 1.1	Dated 1-May-2022	View
Documents to Provide	Version November 2022	Dated 25-Nov-2022	View

Once each document has been **viewed**,
You can;

1. Print it out
2. Save it

Book an appointment

1. Click on book your appointment on the right hand side

Book your appointment

2. Select the type of meeting you would like

Mathew Fogarty

Welcome to my scheduling page. Please follow the instructions to add an event to my calendar.

FPD Meeting

Meeting with Mathew Fogarty of Financial Planning by Design. Following your booking, you will be taken to our web page. Please have a browse through and in partic...

Client Planning Meeting

A meeting to review the progress of your goals and your current financial situation. Following your booking, you will be taken to our web page. Please have a brow...

Client 30 Minute Phone/Zoom Meeting

A quick phone or zoom meeting to determine if we need to take further action or whether the query can be resolved. Following your booking, you will be taken to ou...

Client Initial Discovery Meeting

The opportunity to explore the goals you wish to achieve and how Financial Planning by Design may assist. Following your booking, you will be taken to our web p...

Client Strategy Meeting

Let's walk through the strategies and

3. Find a time that suits you

Select a Date & Time

December 2022

MON	TUE	WED	THU	FRI	SAT	SUN
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Time zone

Sydney, Melbourne Time (11:58am)

Answer Key Questions

Step 1 - Key questions

Answer some key questions about how your situation or preferences may have changed.

Click on Step 1 – Key Questions

1. Answer key questions on what you would like to discuss & what advice you are seeking
2. Update your contact details
3. Add or update your goals & what you would like to achieve
4. Update your estate planning situation

Key questions — Contact details — **Goals** — Estate planning

Living & Lifestyle		
Fund one-off expenditure of $300,000 to renovate home	2023/2024	
Fund one-off expenditure of $10,000 for a holiday to Europe.	Now	
Maintain your current regular living expenditure of $70,432 (indexed to inflation).	Ongoing	

Update your information

Step 2 - Update your information

We need your latest information to ensure recommended strategies and your investments are right for you.

Click on Step 2 – Update your information

1. Update your current financial information & provide notes where required;
   - Bank account balances
   - Loan balances
   - Income
   - Expenditure
   - Investments

Assets				
Cash	$25,002	Updated!	Add notes
Superannuation	$201,839	Updated!	Add notes
Pensions	$50,000	Updated!	Add notes
Shares	$55,197	Please update	Add notes
Lifestyle Assets			
Lifestyle assets	$925,000	Please update	Add notes

Upload documents

Upload statements

Securely upload documents

1. Click on upload statements
   - Bank account balances
   - Loan balances
   - Payslips
   - Budgets
   - Investment/super/insurance statements
2. Click on Add

Uploaded documents

Statements, pay slips and other supporting documents

Add

ANZ bank statement	Uploaded: 24-OCT-2022	Edit	Download
Payslip	Uploaded: 20-OCT-2022	Edit	Download
Household budget	Uploaded: 19-OCT-2022	Edit	Download

3. Select File
4. Click on Add

Upload document

Document **Statements, pay slips and other supporting documents**

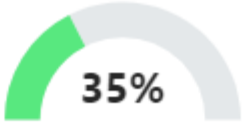
* Document name

Document Choose File No file chosen

Track your progress & submit

1. Track your progress

Meeting preparation progress



STEP 1 - Key questions	✔
STEP 2 - Update your information	!
STEP 3 - Submit	!

FPD

Finish

Home

Thank you, you have successfully completed the preparation for your meeting! Click the submit button to notify us.

COMPLETED

The information you have provided is complete and accurate to the best of your knowledge. You understand and acknowledge that by either not fully or accurately providing information, any recommendation or advice given in these circumstances may be inappropriate to your needs and that you risk making a financial commitment to an investment or product that may not be appropriate to your overall investment objectives, financial situation and particular needs.

* Agree ☑

Thank you for completing your meeting preparation. We look forward to seeing you soon!

Submit

2. Click on Submit

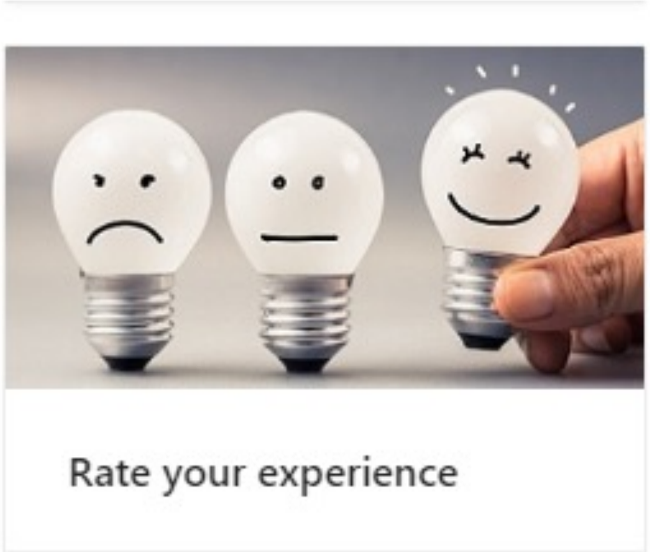
Step 3 - Submit

Once you have completed the Key Questions and have Updated your information, please submit your information.

Rate your experience

1. Click on Rate your experience

Help us improve with your feedback



Documents

Welcome Joe and Mary

- Home
- **Documents**
- Service
- Financial projections
- Meeting preparation

Secure document storage

Conveniently store copies of your important documents in a single, secure location. Have all your important information readily available at your fingertips.

Keep paper copies

While storing all your important documents in one place is very convenient, it is important that you keep paper originals of legal documents such as Wills and Power of Attorney in a safe place.

Where can I store my documents?

Store your documents

1. Click on the section
2. Click on Add
3. Select your file
4. Click on Add

Wills 0

A will or testament is a legal document that expresses a person's wishes as to the distribution of certain property after their death.

Power of Attorney 0

A power of attorney is a legal document in which a person nominates and gives legal authority to another to act on financial affairs on their behalf.

Warranties and proof of purchase 0

A warranty is a written guarantee issued to the purchaser of an article by its manufacturer, promising to repair or replace it if necessary within a specified period of time.

Insurance policies 0

An insurance policy is a document detailing the terms and conditions of a contract of insurance.

Tax returns 0

A paper or electronic form used to make an annual statement of income and personal circumstances used by the tax office to assess liability or refund of tax.

Where do I find documents from FPD?

For documents from FPD

1. Click on download
2. Save the document to your file

Advice related documents

Applications & Forms	Information Release Form	Applications and forms to be downloaded and completed	23-November -2022	Download
Applications & Forms	AIA DDR	Applications and forms to be downloaded and completed	20-October -2022	Download
Agreements & Engagement documents	Terms of Engagement	Our terms of agreement or fixed term agreements outline the services we are providing and the fees charged for those services	19-October -2022	Download

How to view your position

Your net position

View by entity

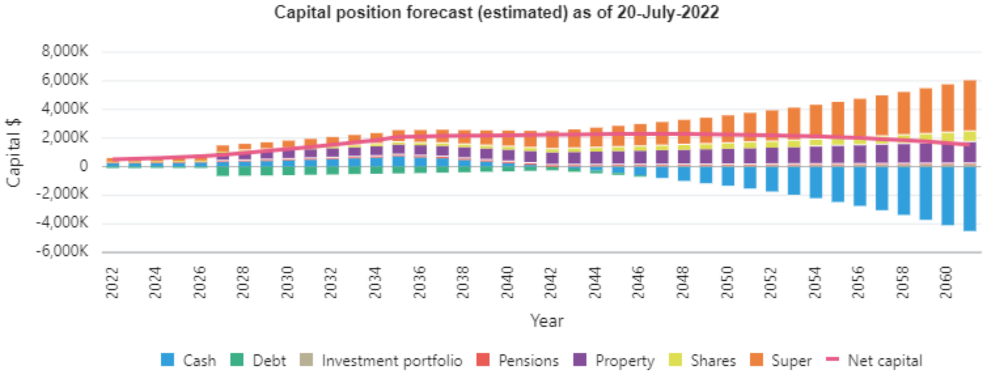
Cash	$25,002
Superannuation	$201,839
Pensions	$50,000
Shares	$55,197
Lifestyle assets	$925,000
Loans	-$127,500
	$1,129,538

Your life insurances

AAMI Insurance	AAMI Insurance	Joe	Life: $1,000,000	TPD: Nil	Trauma: Nil	IP: Nil

Risk profile

Joe	FPD Sol - Conservative
Mary	FPD Sol - Conservative



0 Unread documents

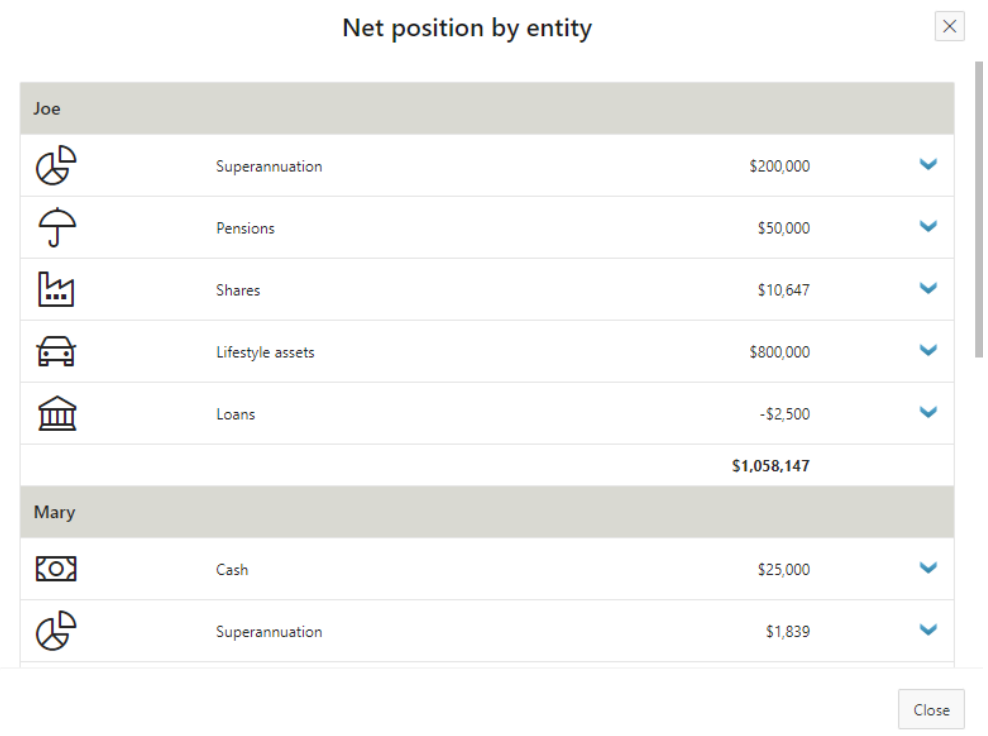
1 Stored documents

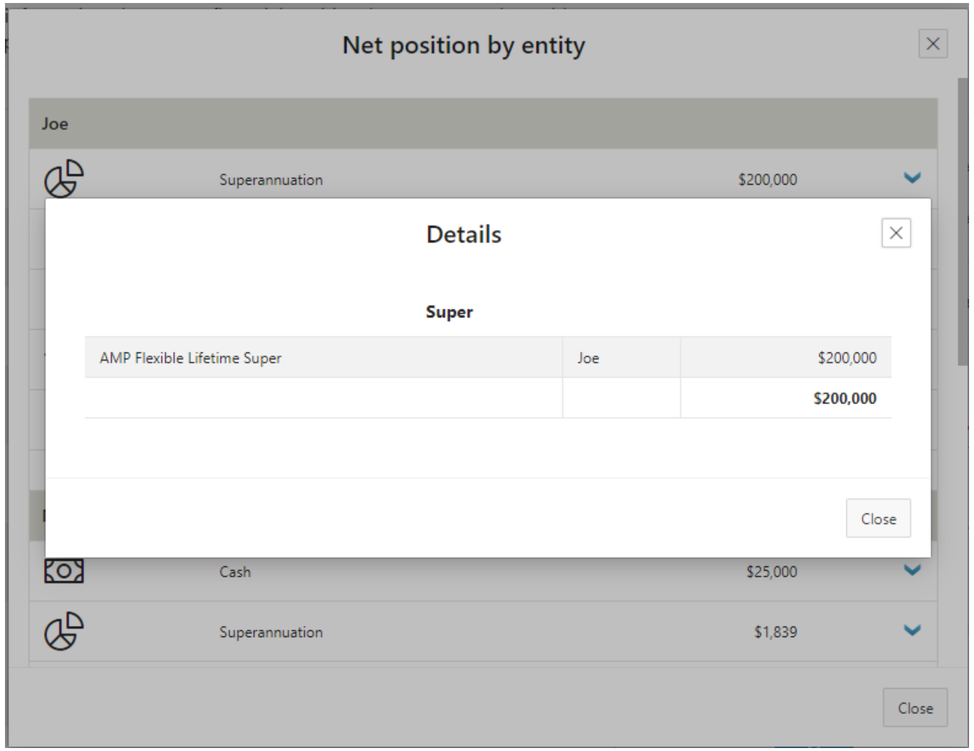
0 Active services

How do I view my portfolio?

To view details of your position

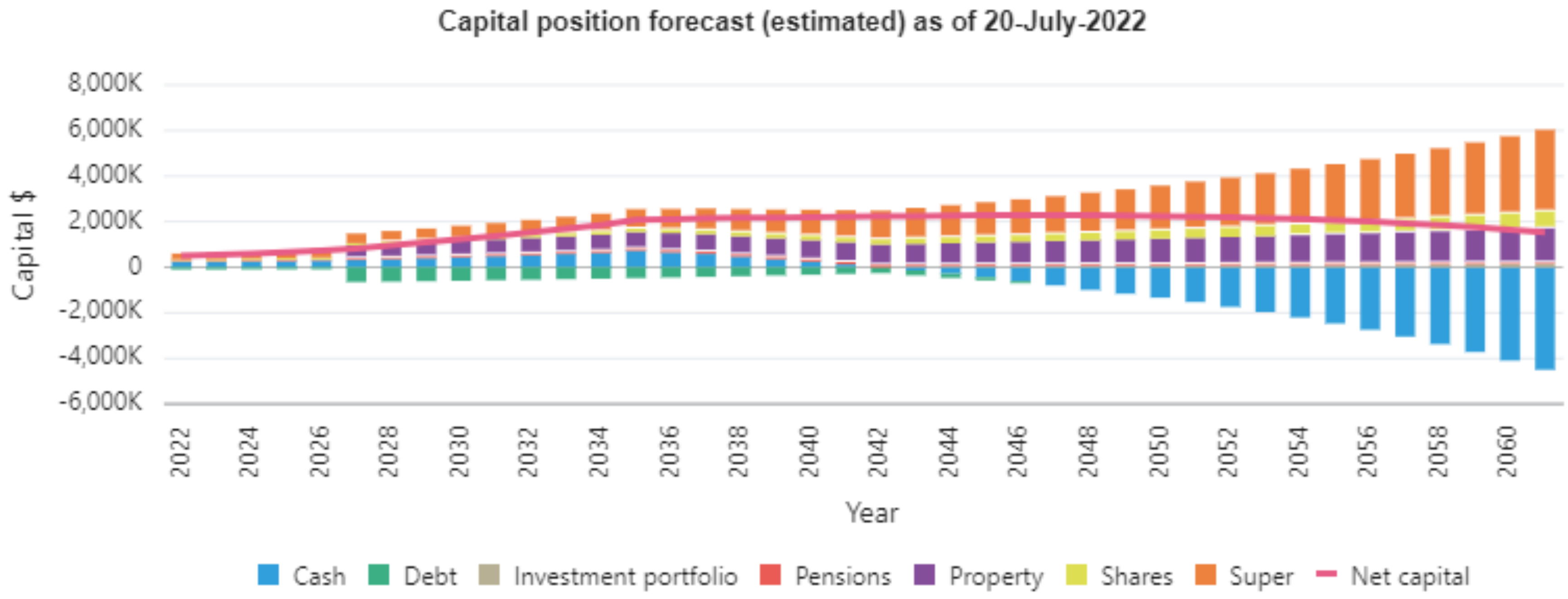
1. Click on view by entity
2. Select the dropdown arrow



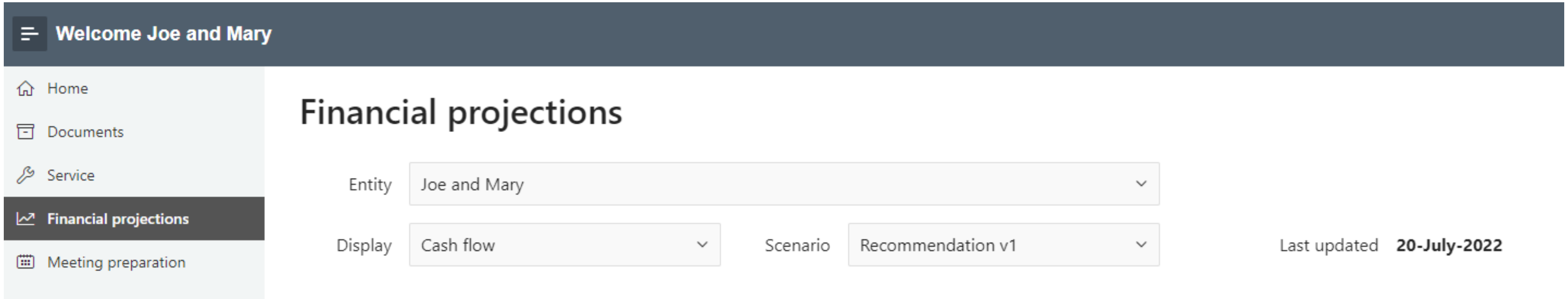


How do I view my portfolio?

1. Move the cursor over the graph to view different forecasts

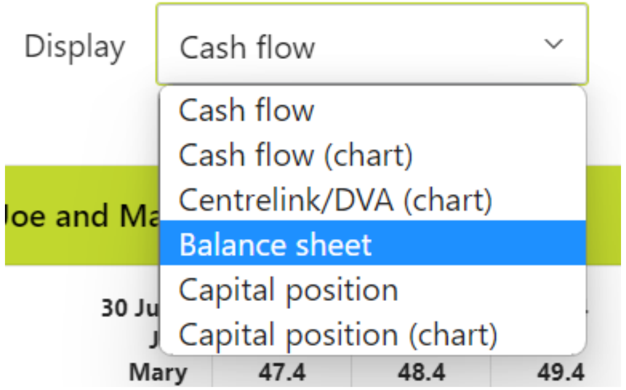


How to view your projections



How do I view the projections?

1. Select the drop down box to see the options



Financial projections

Entity: Joe and Mary

Display: Cash flow

Scenario: Recommendation v1

Assumptions

Last updated **20-July-2022**

Joe and Mary

30 June Joe Mary	2022 52.3 47.4	2023 53.3 48.4	2024 54.3 49.4	2025 55.3 50.4	2026 56.3 51.4	2027 57.3 52.4	2028 58.3 53.4	2029 59.3 54.4	2030 60.3 55.4	2031 61.3 56.4	2032 62.3 57.4	2033 63.3 58.4	2034 64.3 59.4	2035 65.3 60.4	2036 66.3 61.4	2037 67.3 62.4
Income from all sources																
Gross income - Salary	162,779	167,662	172,692	177,873	183,209	188,705	194,367	200,198	206,204	212,390	218,761	225,324	232,084	239,046		
PAYG tax withheld	-48,573	-50,480	-52,447	-54,475	-56,799	-59,390	-62,054	-64,791	-67,602	-70,510	-73,516	-76,596	-79,773	-83,048		
Net income - Salary	**114,206**	**117,183**	**120,245**	**123,398**	**126,410**	**129,316**	**132,313**	**135,407**	**138,602**	**141,880**	**145,245**	**148,729**	**152,311**	**155,999**		