

NEXIA AUSTRALIA WEALTH CONNECT

FREQUENTLY ASKED QUESTIONS

What is Nexia Australia Wealth Connect?

It is a secure vault solution provided by Nexia to enable its personal clients to get their affairs in order, and to enable the Nexia Advisers to securely access the client's information to provide proactive consultation and quality advice to clients to invest, borrow and manage their portfolios.

How do I obtain a login ID to access Nexia Australia Wealth Connect?

Please contact your Nexia Account Manager or Adviser to have your Nexia Australia Wealth Connect login ID and password set up to access Nexia Australia Wealth Connect secure vault.

I forgot my Nexia Australia Wealth Connect login and/or password. How do I get that resolved?

Go to Nexia Australia Wealth Connect secure vault and click on either 'Forgot Username' or 'Forgot Password'. An email will be sent to the email address that was used to set up the login initially. Follow the prompt in the email to access Nexia Australia Wealth Connect secure vault.

If you forget which email address was used to set up the Nexia Australia Wealth Connect, please contact your Nexia Account Manager or Adviser to find out.

How do I upload document in Nexia Australia Wealth Connect?

Go to Document mini dashboard and click on Upload Documents under Documents section.

Provide all the details requested where the field is marked with *. Click on the "Drop file here..." box to find the file you need to upload from your PC or laptop into Nexia Australia Wealth Connect.

You can upload PDFs, images, Word, Spreadsheets, Powerpoints, and ZIP type documents. Click on the UPLOAD button on the top right to upload document

How do I create a Project Template in Nexia Australia Wealth Connect?

Go to Document mini dashboard and click on Projects under Documents section.

You can click on CREATE to create a Project Template or click on CREATE USING TEMPLATE to create your project using an existing project template set up by Nexia.

When you create a project template provide all the details requested where the field is marked with *. Then click on ADD button to add the Category and Type of documents you need for your new Project Template.

If you create a project using template select the project name you require using the drop down.

How do I invite or set up Trusted Entity to access my Nexia Australia Wealth Connect?

Go to Profile mini dashboard and click on Trusted Entities under Profile section. Click on INVITE button to invite Trusted Entity to access your Nexia Australia Wealth Connect. Note that your Trusted Entity cannot access your Nexia Australia Wealth Connect secure vault until he / she goes through all the acceptance process online.

How do I request a document from my Trusted Entity?

Go to Document mini dashboard and click on Request Documents under Documents section. Using the Category, Type and Description field to identify the type of document(s) you are requesting.

Select the Trusted Entity you request the document(s) from.

You can request PDFs, images, Word, Spreadsheets, Powerpoints, and ZIP type documents from your Trusted Entity. Establish the Date and Time (if applicable) that the Document Session will expire. Click on REQUEST button on the top right.

Is the information I kept in Nexia Australia Wealth Connect secure vault really secure?

Yes, you can rest assure that your information held in Nexia Australia Wealth Connect secure vault is secure.

They are encrypted using the latest secure technology. Your information is encrypted at rest. You are the only person who can un-encrypt your information when you sign into Nexia Australia Wealth Connect. The only other people who can access your information are those whom you have given access permission to, i.e. your Nexia Account Manager, Nexia Adviser, your Trusted Entities, and may be your Partner (if you so desire).

The system security is regularly subjected to security testing, including penetration testing to identify any anomaly to be rectified immediately.

How long is my information going to be kept in Nexia Australia Wealth Connect?

According to Nexia Australia Wealth Connect information policy your information will be kept in perpetuity.

If you stop being a client of Nexia Australia Wealth Connect your information is then archived securely.

Can anyone, other than myself, access my information in Nexia Australia Wealth Connect secure vault?

Your information held in Nexia Australia Wealth Connect secure vault is encrypted for security reasons using the latest secure technology. Your information is encrypted at rest. You are the only person who can un-encrypt your information when you sign into Nexia Australia Wealth Connect. The only other people who can access your information are those whom you have given access permission to, i.e. your Nexia Account Manager, Nexia Adviser, your Trusted Entities, and may be your Partner (if you so desire).

How often is my banking information updated?

Nexia Australia Wealth Connect does an automatic update of your banking information at the end of every day. This does not necessarily mean that your bank information is up-to-date because it relies on Yodlee <https://www.yodlee.com/> to provide the updates. If Yodlee has not provided Nexia Australia Wealth Connect with your latest banking information then it may not be up-to-date.

The last update date appears against your banking information in Nexia Australia Wealth Connect.

A refresh button is provided in the app to allow the user to request information update any time.

How often is my property valuation data updated?

Nexia Australia Wealth Connect does an automatic update of your property valuation every month. The data source is from CoreLogic RP Data <https://www.corelogic.com.au/products/rp-professional>.

The last update date appears against your banking information in Nexia Australia Wealth Connect.

A refresh button is provided in the app to allow the user to request information update any time.

Do you have a user guide for Nexia Australia Wealth Connect?

Yes, we have a user guide which will be provided to you upon account creation.

Where are my signed documents stored?

Your signed documents are stored in your secure vault in a private cloud hosted in Australia. We are compliant with Australian Privacy Principle 8 – cross-board disclosure of personal information.



How does multi-currency work in Nexia Australia Wealth Connect?

If you have a foreign currency account, it can be added to your assets section within your secure vault.

A field is provided to represent the currency and balance of the foreign currency account. Pick the correct currency from the drop down.

When you review the listed actual Asset balance Nexia Australia Wealth Connect shows the converted AUD balance using the rate published by Yodlee <https://www.yodlee.com/> on the day.

As a Nexia client using Nexia Australia Wealth Connect how do I find out who are my Nexia Advisers?

Go to your Nexia Australia Wealth Connect user drop down on the top right of your client dashboard.

On the drop down you will see "My Advisers" to find all the Nexia Advisers who have been assigned to service you.

From there you will be able to send Messages to your assigned Nexia Advisers to consult with them.

For any further questions, or assistance with the platform, please contact:

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