



HIGHVIEW Portal

Your Portal & App Guide

Uniquely designed to add value and convenience to the lives of Highview Accounting & Financial clients.

Get your finances sorted with your new Portal, accessed by your computer or via our app!



Everything in one place

- ✔ Store all your important documents and access them whenever you need.
- ✔ Conveniently receive, sign and return Highview documents electronically anytime, anywhere.
- ✔ Benefit from automatic reminders, ensuring tasks stay on track.
- ✔ Keep up-to-date and access our latest blogs and important notifications anytime, on any device.
- ✔ Manually build your own wealth portfolio and track your money habits.
- ✔ Pay your Highview invoices.
- ✔ Coming soon: book an appointment with your Accountant!
- ✔ Plus, many other features such as tax calculators, to-do lists, logbooks etc.



Pay your Highview invoice – anytime, anywhere on any device

We accept Electronic Funds Transfer and Credit Card payment online, or you can apply for a Monthly Payment Plan if you think that might help! All at the click of a button, using the information provided to you on your Highview invoice.

You can make a payment via



EFT



Credit Card



Monthly Payment Plan

No more paper trails

Sign important documents from Highview anytime – at home or on the go.

- Your Portal will notify you when a document needs attention.
- All you'll need is a click, tap or digital signature. The instructions on the document will guide you. That's it! No more printer mishaps or driving to your local office (or post office) to deliver signed documents.



Store your documents in the cloud

Save important paperwork and records in a single, secure location.

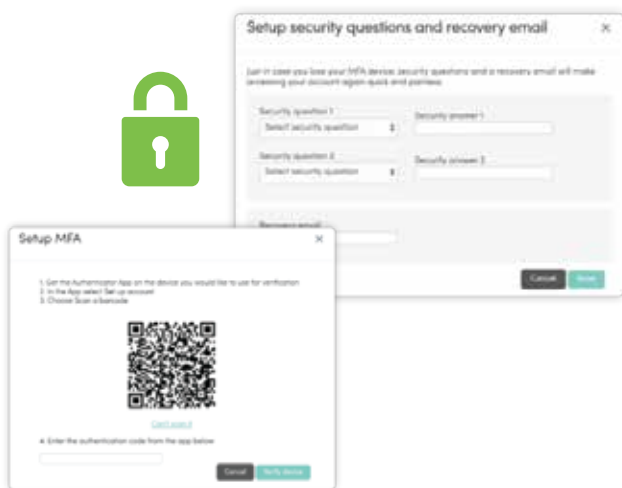
- Business Activity Statements (BAS).
- Tax Returns.
- Estate Planning and Wills.
- Financial Statements.
- Bank and Rental Statements etc.

Having all your documents in one place makes them easy to find and manage.



Know with confidence your data is secure

- Bank level security: your Portal uses the same encryption standards banks use to protect your information.
- Your money is untouchable: as a read-only service, your Portal cannot be used to move funds.
- Additional security available: you can enable multi-factor authentication to further secure your Portal at anytime.



Where to find more information

Visit our website: highview.com.au/app-support/
or email support@highview.com.au

FEB 2020

How to get started



Step 1.

We will send you an email invitation to your Highview Portal.



Step 2.

Activate your account and start entering your details (HINT: This might be easiest to do on your computer).



Step 3.

Download the mobile HIGHVIEW App, login and start accessing all your Portal information.



FAQs

Do I need to be a client to use the Portal?

Yes, you do. This Portal is specifically customised for clients of Highview - consider yourself special!

Do I have to pay to use the Portal?

Not at all! The Portal has both free and premium subscriptions available. Premium subscriptions are only available to Highview Financial Planning clients who've signed up to one for our Financial Planning ongoing packages.

If I'm a Highview client, must I get this Portal?

Yes, you must. By July 2020 Highview will be using this platform for all document signing requirements. It will save you time and enable you access to your documents anytime you need.

Does Highview have support for setting up and using the Portal?

Yes of course! We have loads of helpful support information on our website here: highview.com.au/app-support as well as a dedicated support email you can contact with your query anytime: support@highview.com.au.

