Your wealth portal

WEALTH ARENA
PRIVATE WEALTH ADVISORS

Take control of your finances with a personal wealth portal

Say hello to your financial world's new command centre. Set yourself up for success with the portal's powerful organisation, analytics, and collaboration tools.

Keep your finances organised

From property and bank accounts to loan repayments, insurance, and estate planning, connect all aspects of your financial world in one place.

Track your spending, create new habits

Whether you're spending too much on travel, coffee, or shoes, your portal helps you manage your spending with easy to use cashflow and budgeting features.

Stay on target with monthly reports

Stay on top of your goals with monthly financial health checks delivered straight to your inbox. Get updates on your budgets, goals, and tax deductions.

Build your A-Team

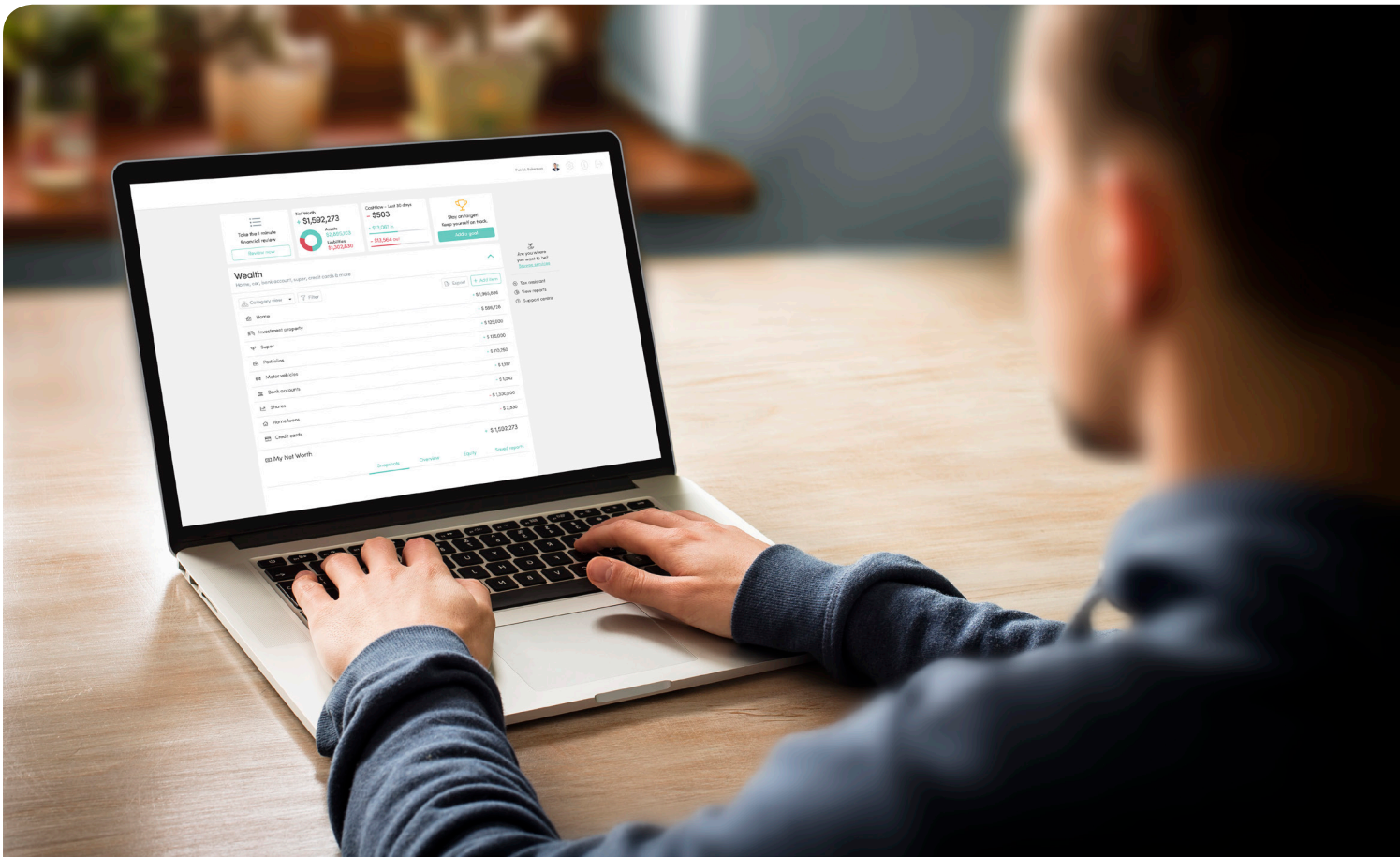
Invite family members and professionals, like your property manager and lawyer, to collaborate. Assign permissions to control what they can view or change.

Make smarter decisions

With powerful reports and purpose-built wizards like the Tax Assistant, the portal is chock-full of tools to help make managing your finances a breeze.

Reach your goals

Planning to retire at 50? Buy a third property? Create a legacy for your family? Whatever your goals, the wealth portal can help you get there.



Everything you need, in one place

Live feeds for a live view of your financial world

Enable live feeds for a live, comprehensive snapshot of your financial position. Watch as it evolves over time.*

Smart cashflow & budgeting

Experience pain-free budgeting with auto-categorised transactions, tags, and the ability to create tasks and attach receipts.

Next-generation document management

More than just budgeting, use your portal to securely store important documents for easy collaboration.

Goal calculators to achieve your goals

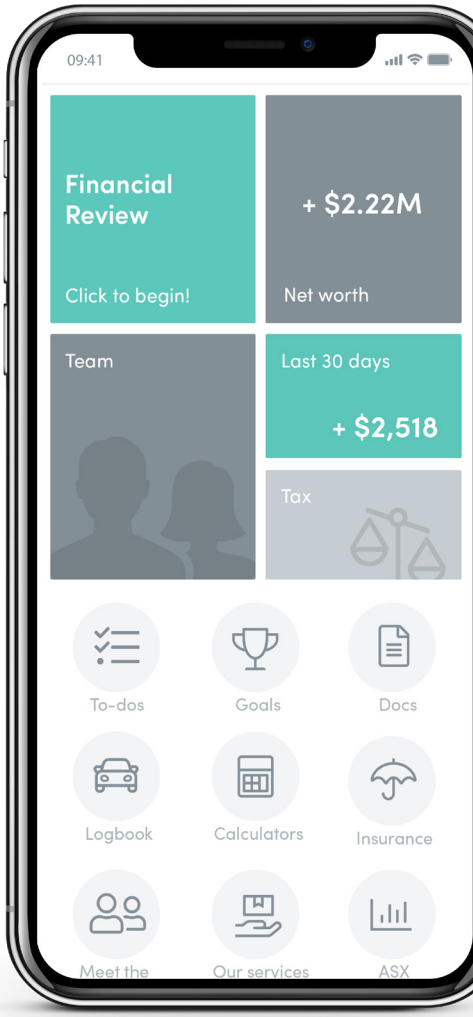
Create goals and pair them with an account or credit card to understand how - and when - you can achieve them.

Cross-device to-do list for yourself & your team

Create and assign tasks. Set deadlines and get reminders on both desktop and mobile.

Tools for tax, property, estate planning & more

Your portal can do much more! Whatever your needs, we're just a few clicks away.



Whether you're looking for peace of mind or a platform to reach your goals, your wealth portal has the right features to help you get there.

Your security, our top priority

Layered defence

Layers of security are embedded throughout the platform to ensure the safety of your financial data.

Bank level security

We use the same levels of encryption as banks and other financial institutions.

Your money is untouchable

As a read-only service, the wealth portal cannot be used to move or modify funds.

* Not all features are available by default, and some, like live feeds, may come at an extra cost. Talk to us today for more information.