MyWealth Mobile App User Guide

For FAME FINANCIAL ACCESS MADE EASY B2B Users

A complimentary mobile app to FAME

Usable by both Advisers and Clients

Overview

Advisers will be able to:

- View the holdings of all their clients, along with performance
- View transactions pending, processing, and processed
- Approve transactions (for supervisors)
- Receive notifications for various transactions

Client will be able to:

- Perform first time login
- View the holdings and performance
- View transactions pending your approval, processing and processed
- Approve transactions
- Receive notifications for various transactions
- Withdraw funds for certain account types
- Deposit funds using Paynow or eNets
- Transfer funds from one Phillip Account to another Phillip Account
- *NEW* Apply eGIRO

Downloading the App

- For iOS Devices:

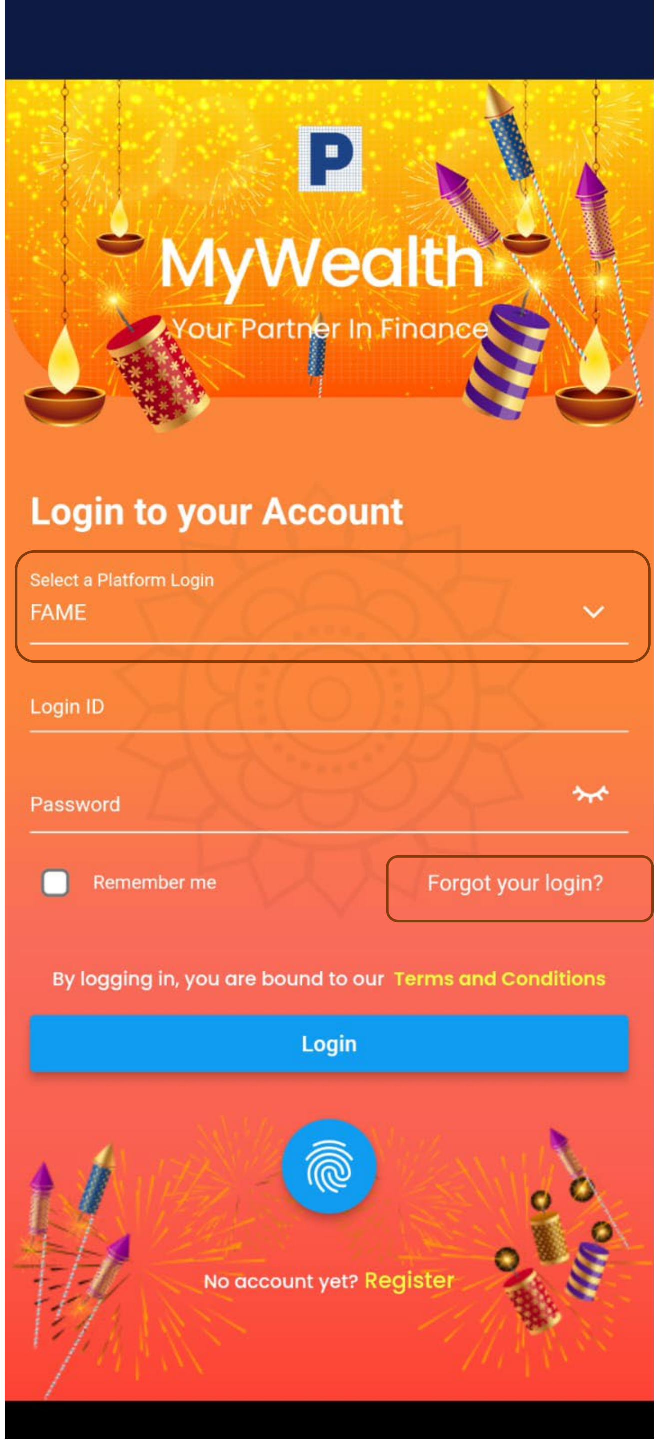
https://apple.co/365zDnS

- For Android Devices:

https://bit.ly/PhillipMyWealth

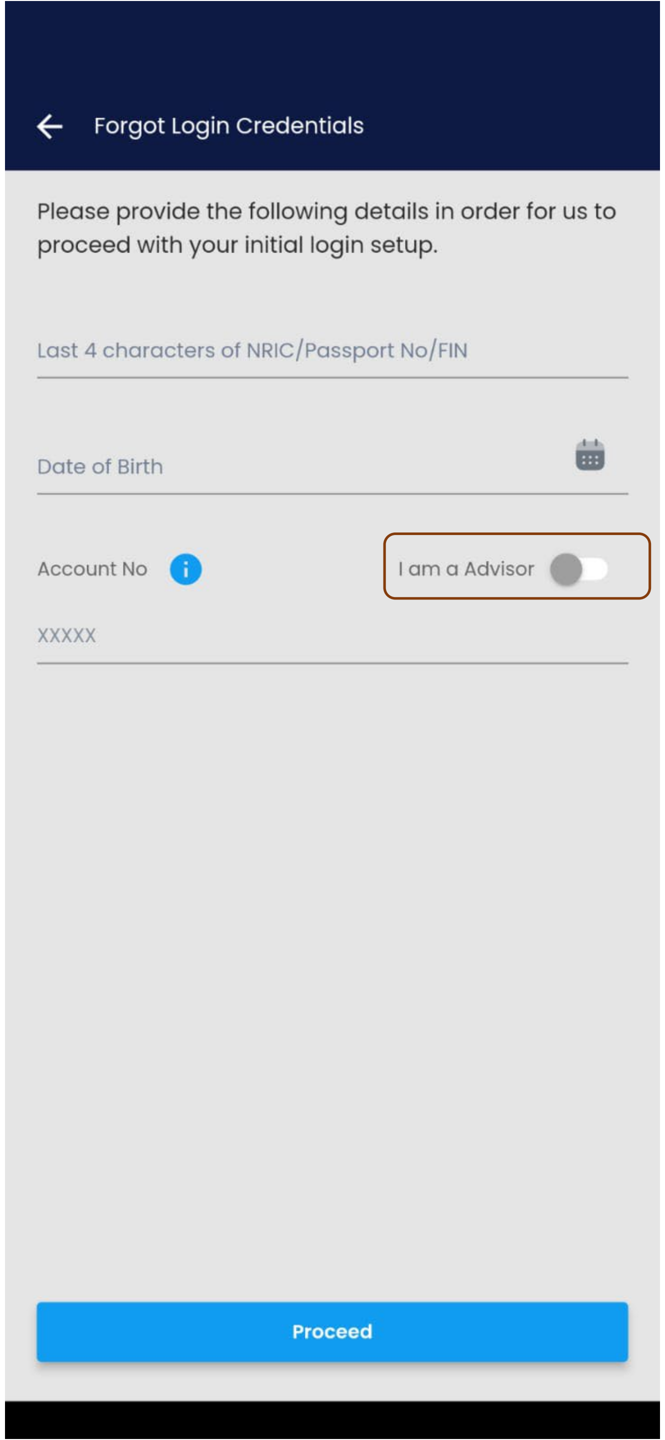
First-time Login/Resetting Login

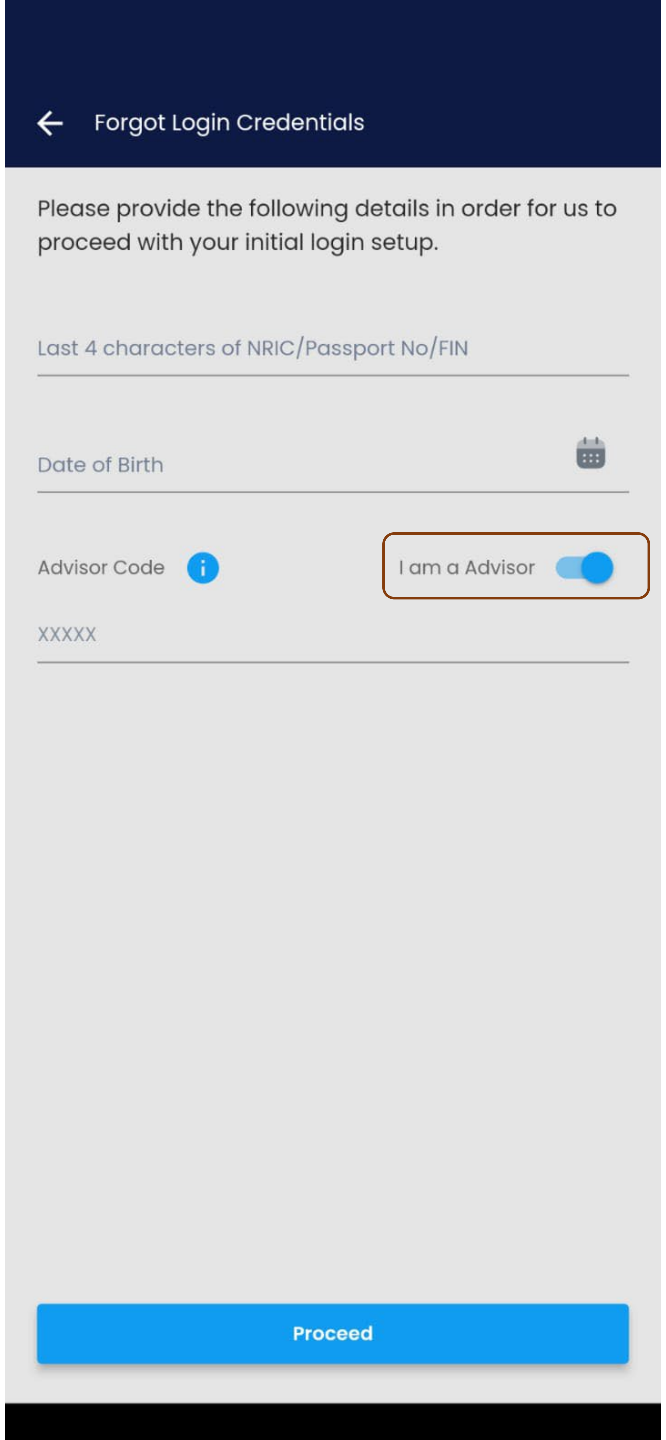
- For first time users, you may perform your first time credential reset through the app
- Select "FAME" platform
- Select "Forgot your login?"



Identification Step

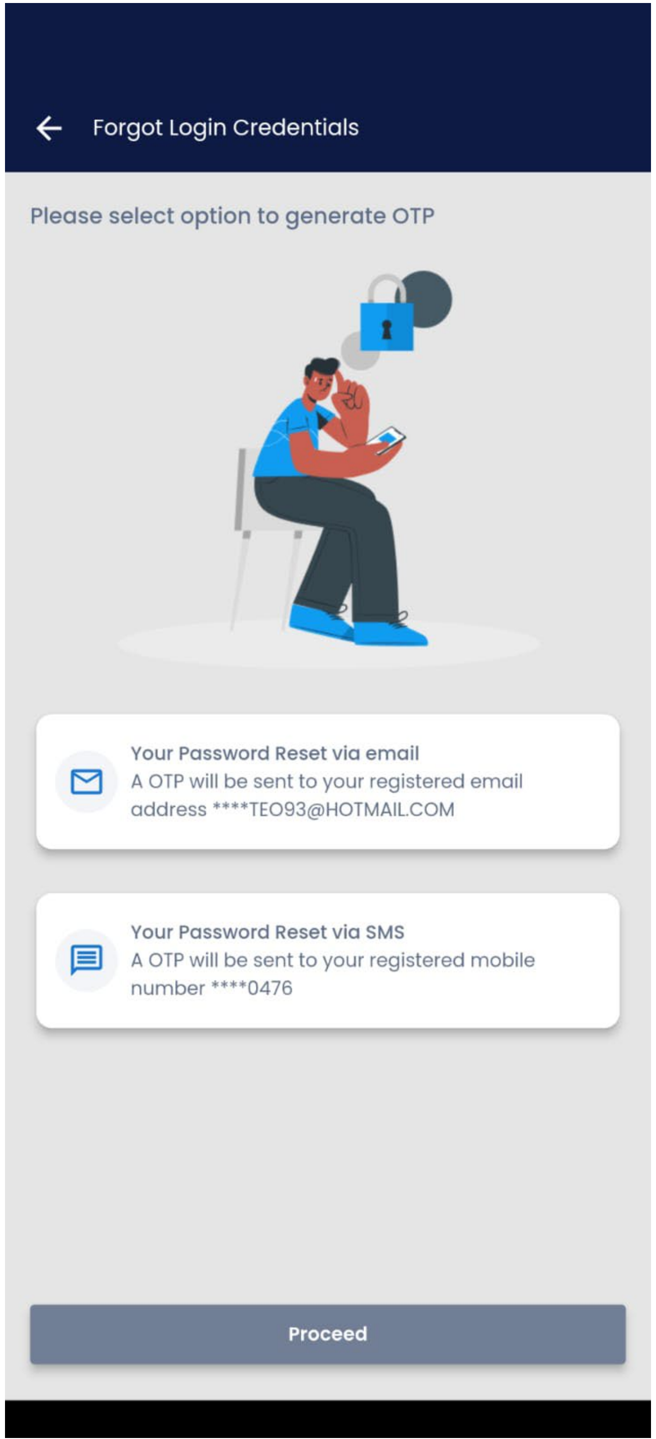
- Enter Last 4 Characters of NRIC/Passport
  (not case sensitive)
- Enter Date of Birth
- For Clients, enter your FAME account number
- For Advisers, enter your FAME code, eg ABC123

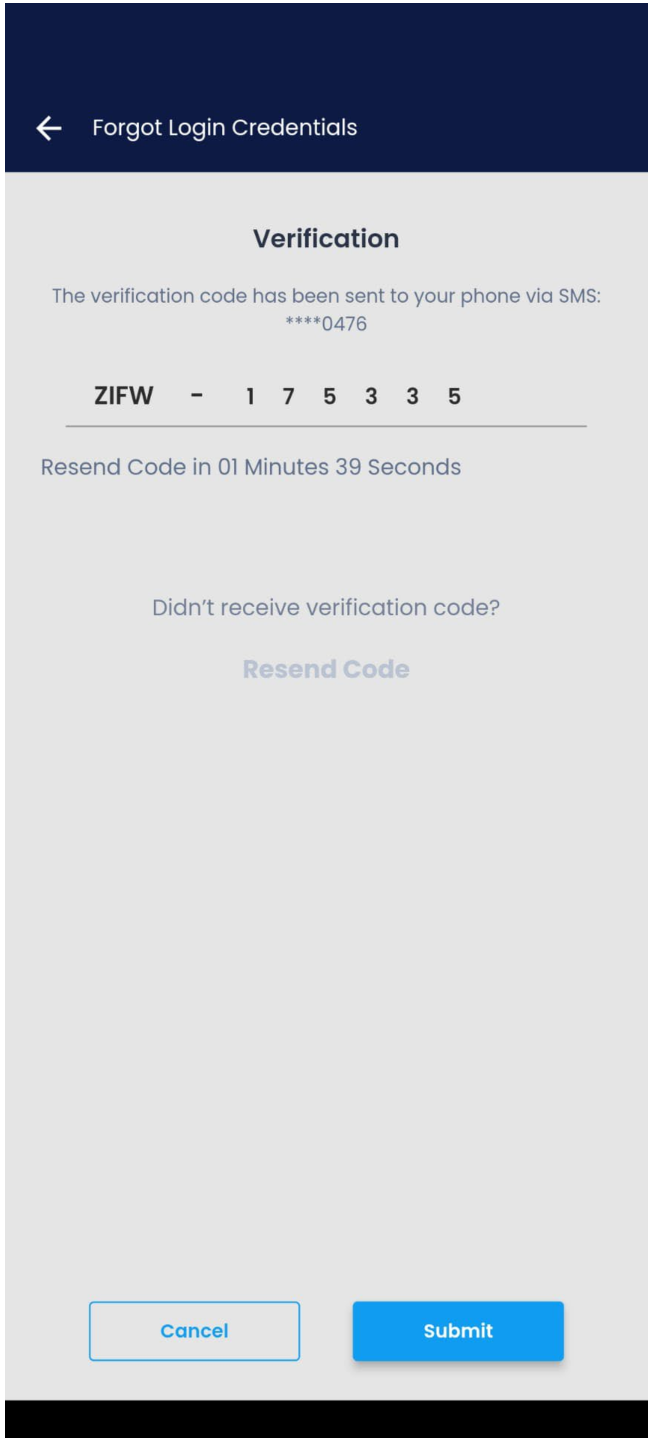




OTP

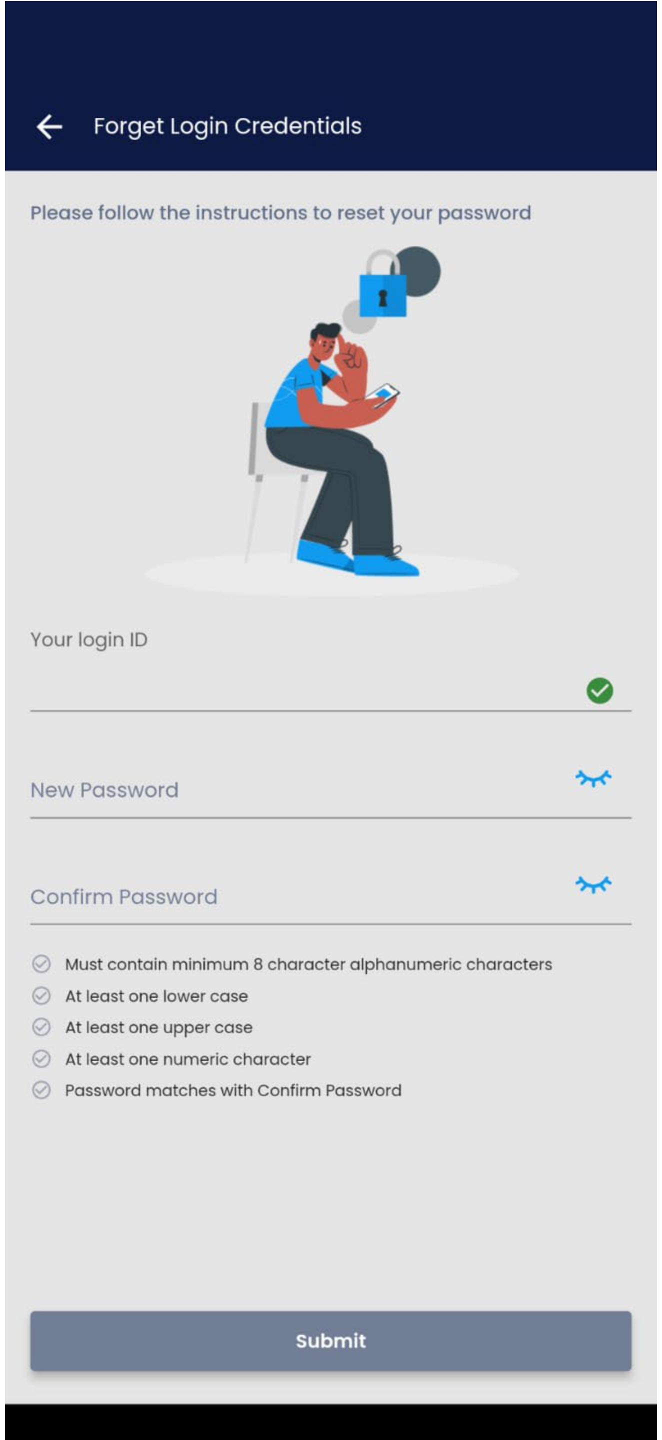
- Choose either to receive OTP via email or SMS
- Enter the OTP and proceed





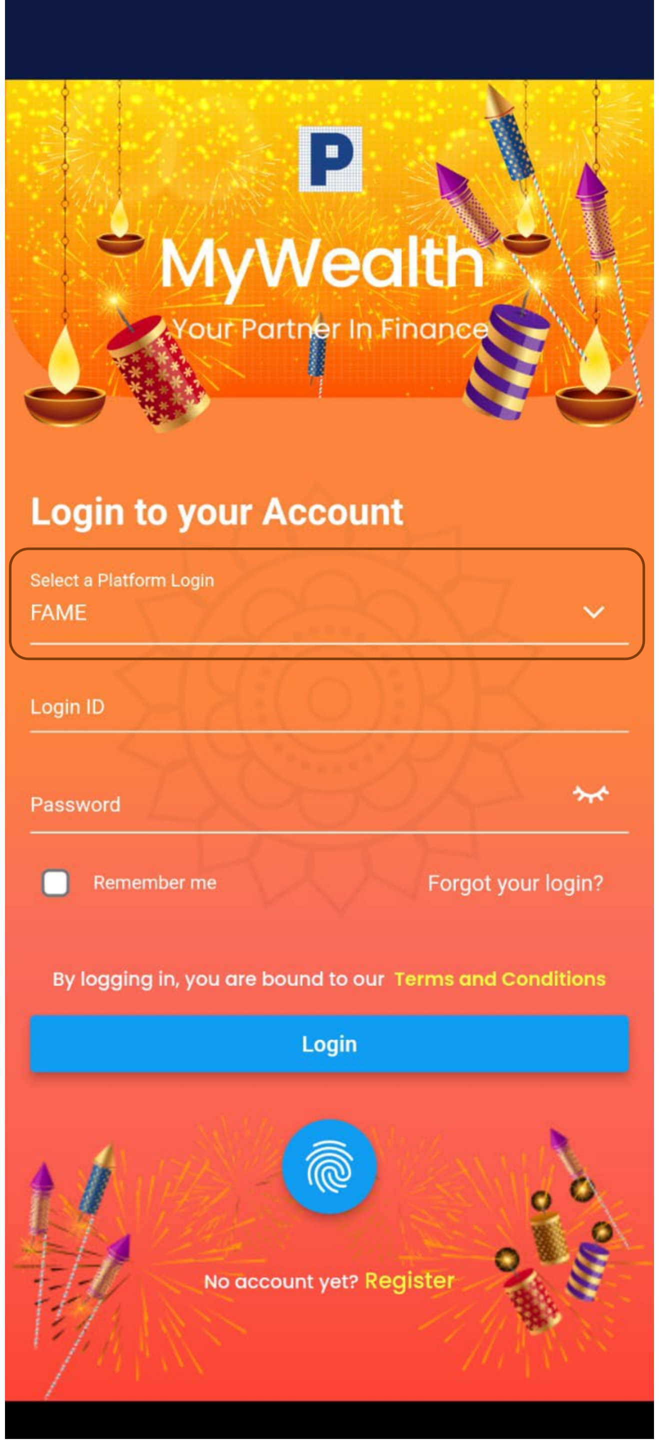
Setting your credentials

- Enter your preferred Login ID and Password
- Login ID must be alphanumeric
- Submit



Logging In

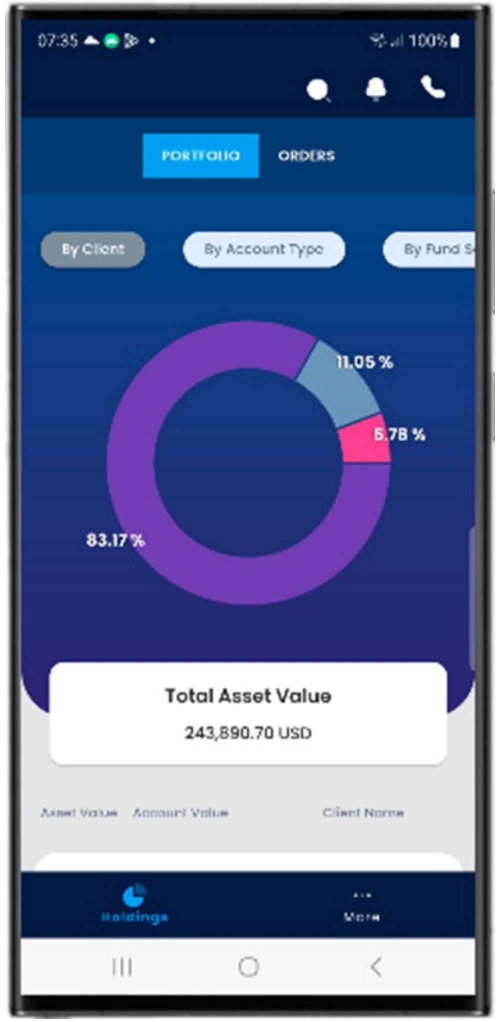
- Please select '**FAME**' as the platform.
- Username and Password are the same as your login credentials on FAME.
- You may also link your phone's bio-sign in such as fingerprint to your login.

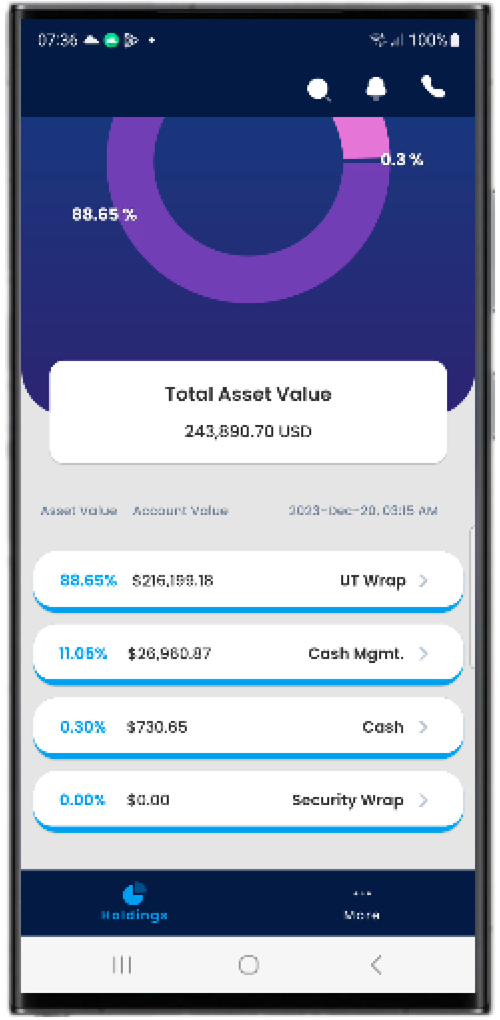


Portfolio Summary (Homepage)

You will be able to view your AUM summary.

Further breakdown by client, account type, fund source, and currency is available.

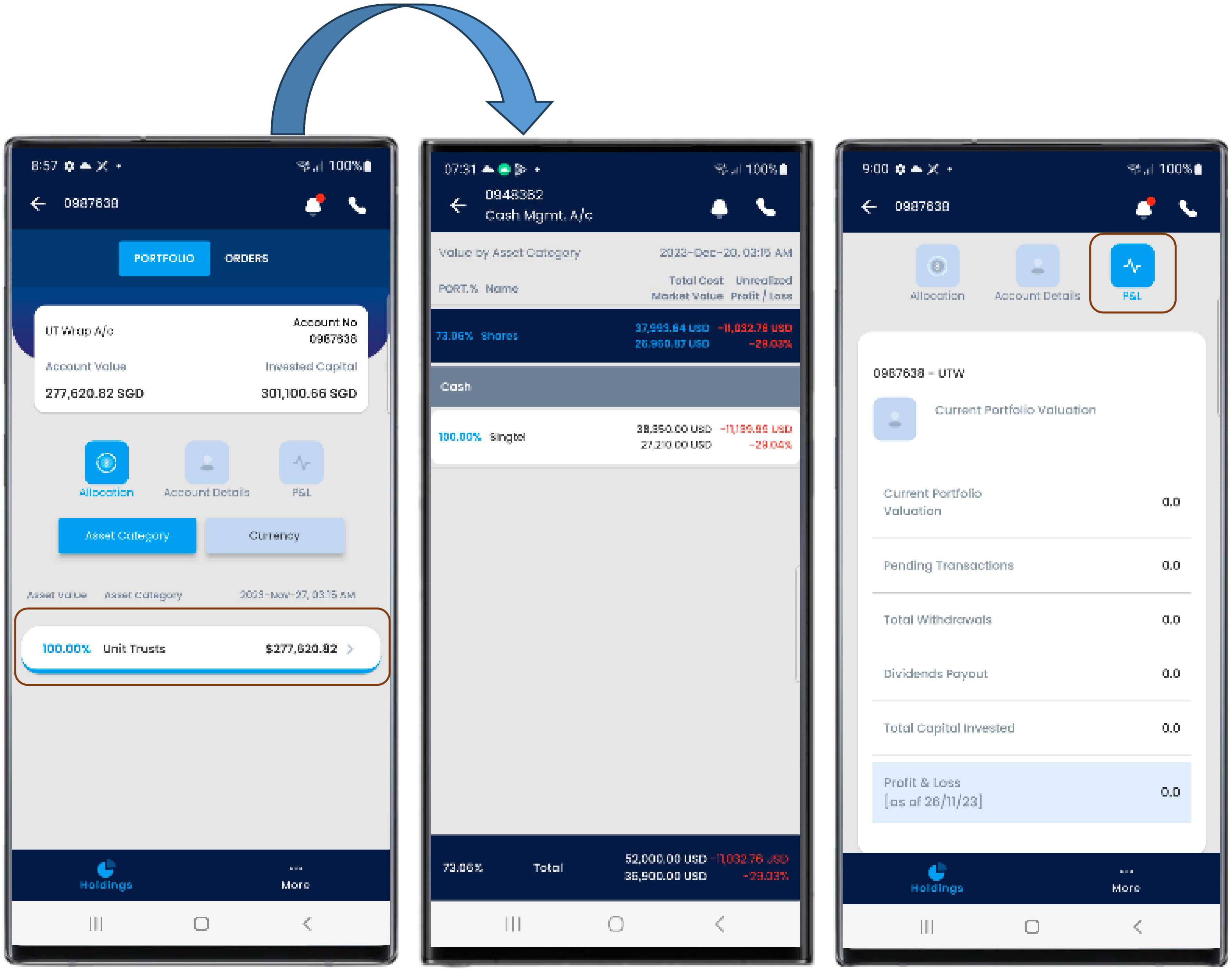




Account Details

More details can be found after selecting the account.

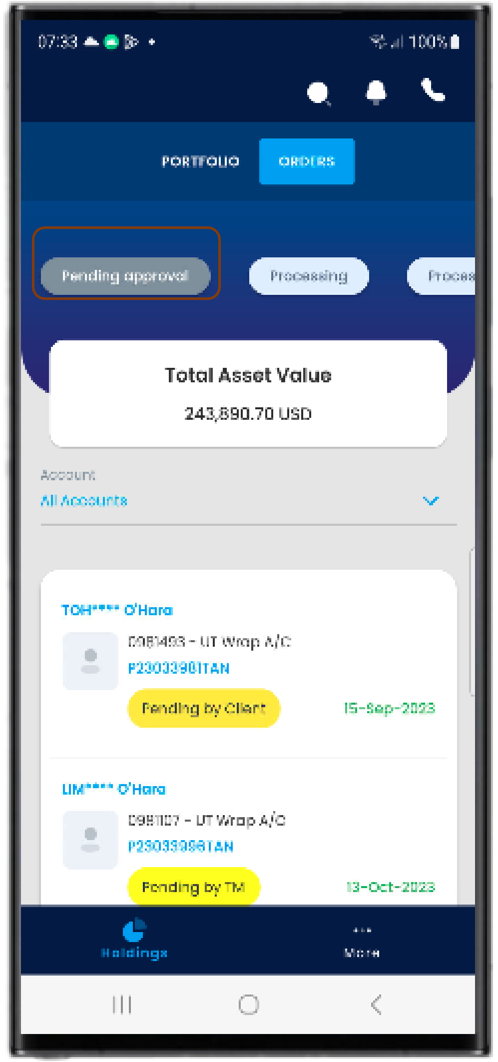
Including detailed account holdings and Profit and Loss table (P&L)

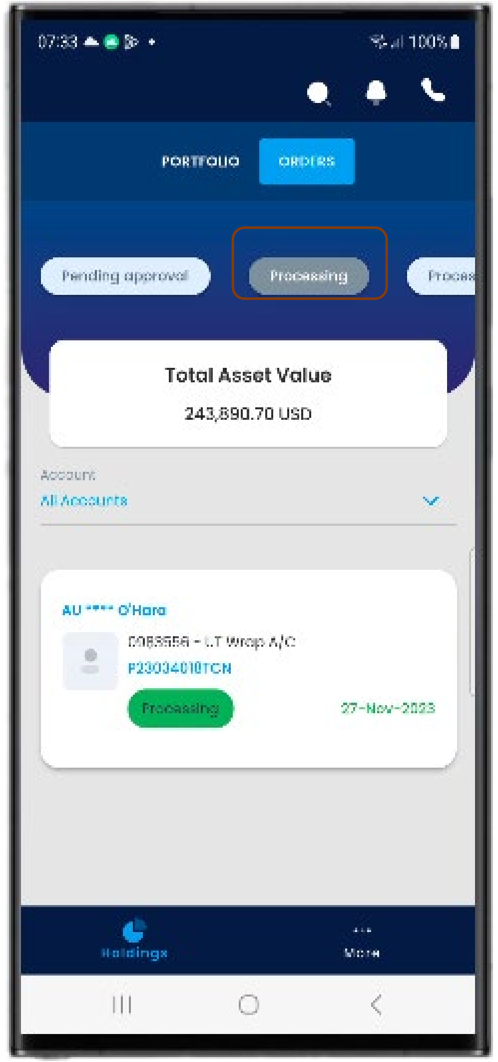


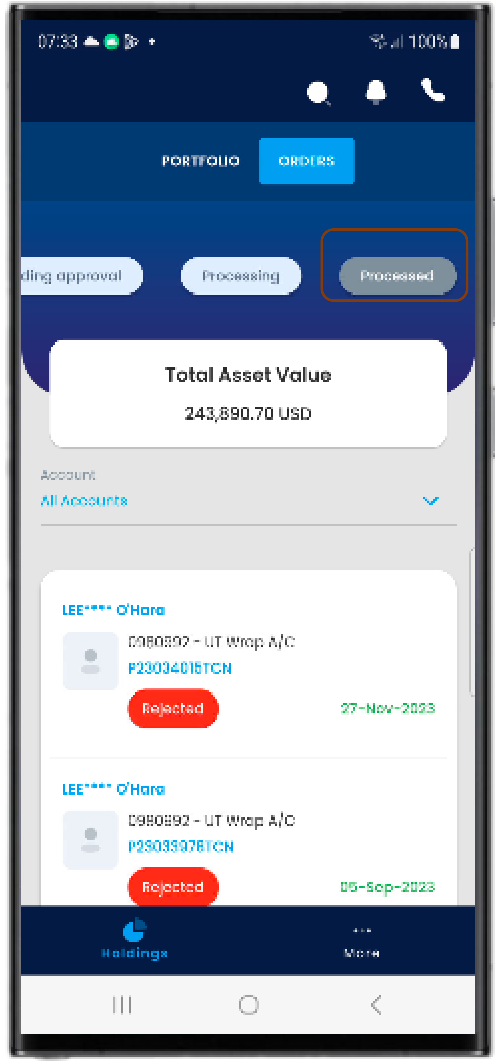
Orders Tab

Allows users to track any orders pending approval.

Track orders under processing and past orders processed.





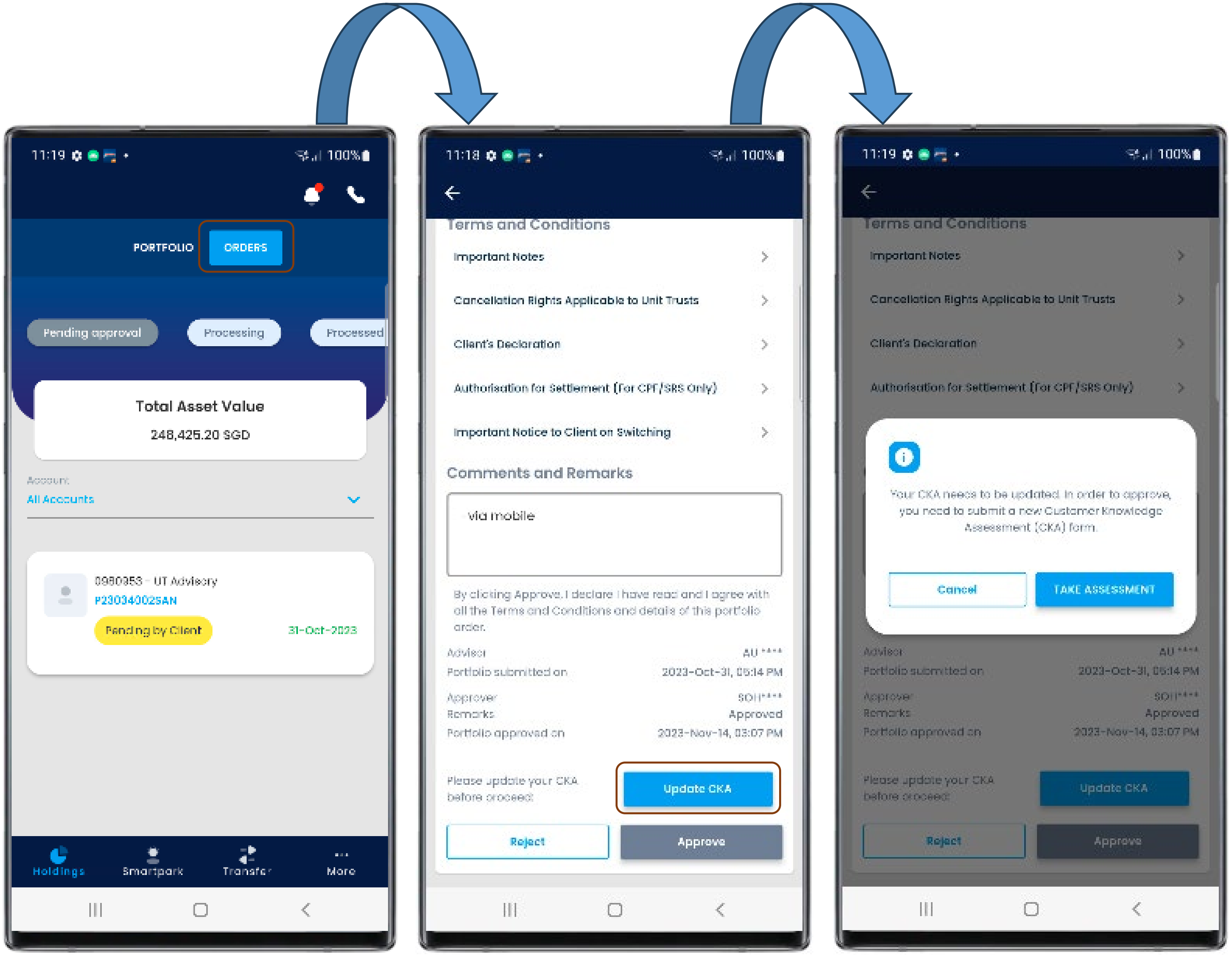


Orders Tab cont

Order approvals can be done within the app by selecting an order pending approval

Order details reflect what was created on FAME

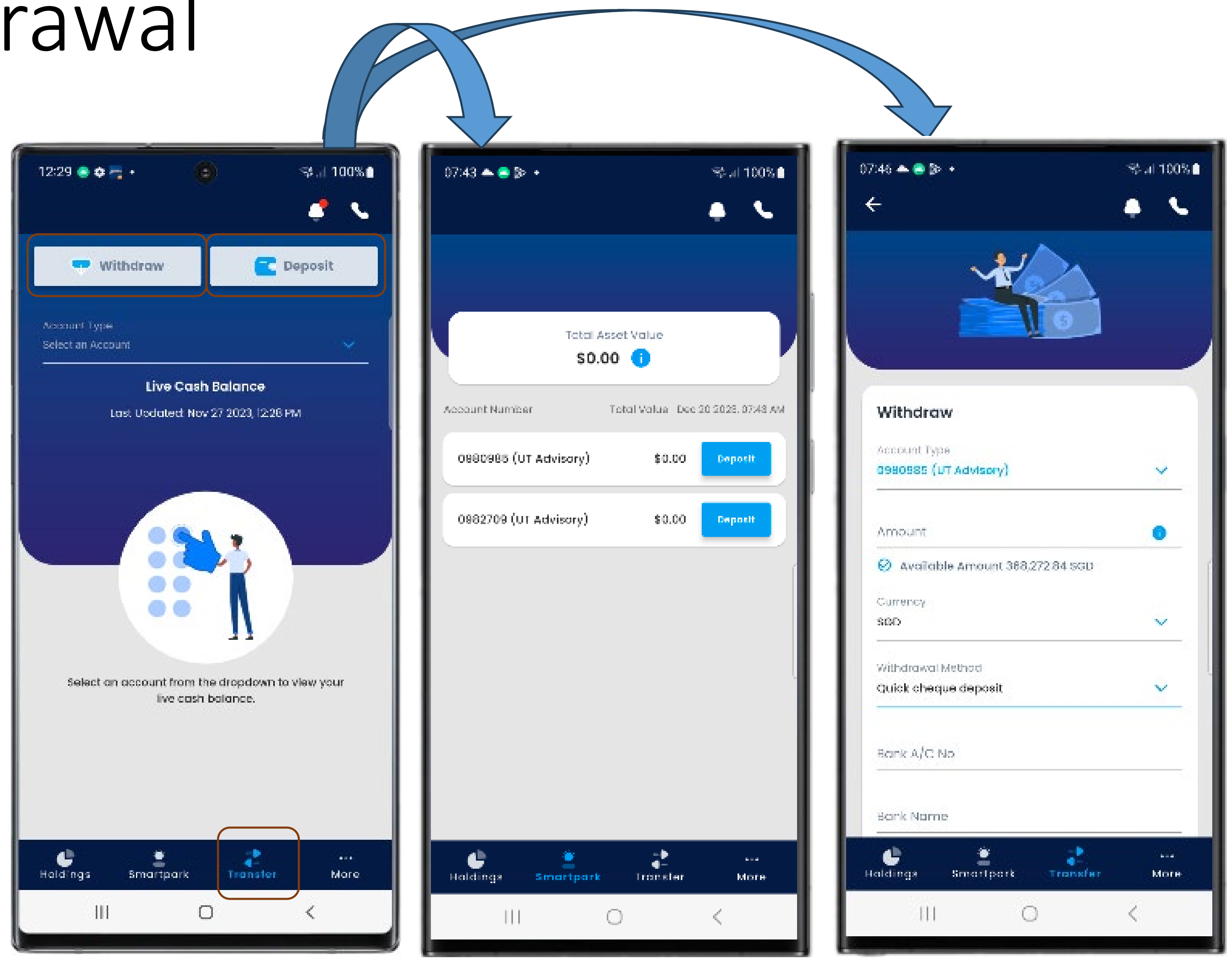
Client Knowledge Assessment (CKA) is completed within the app prior to approval



Deposit & Withdrawal

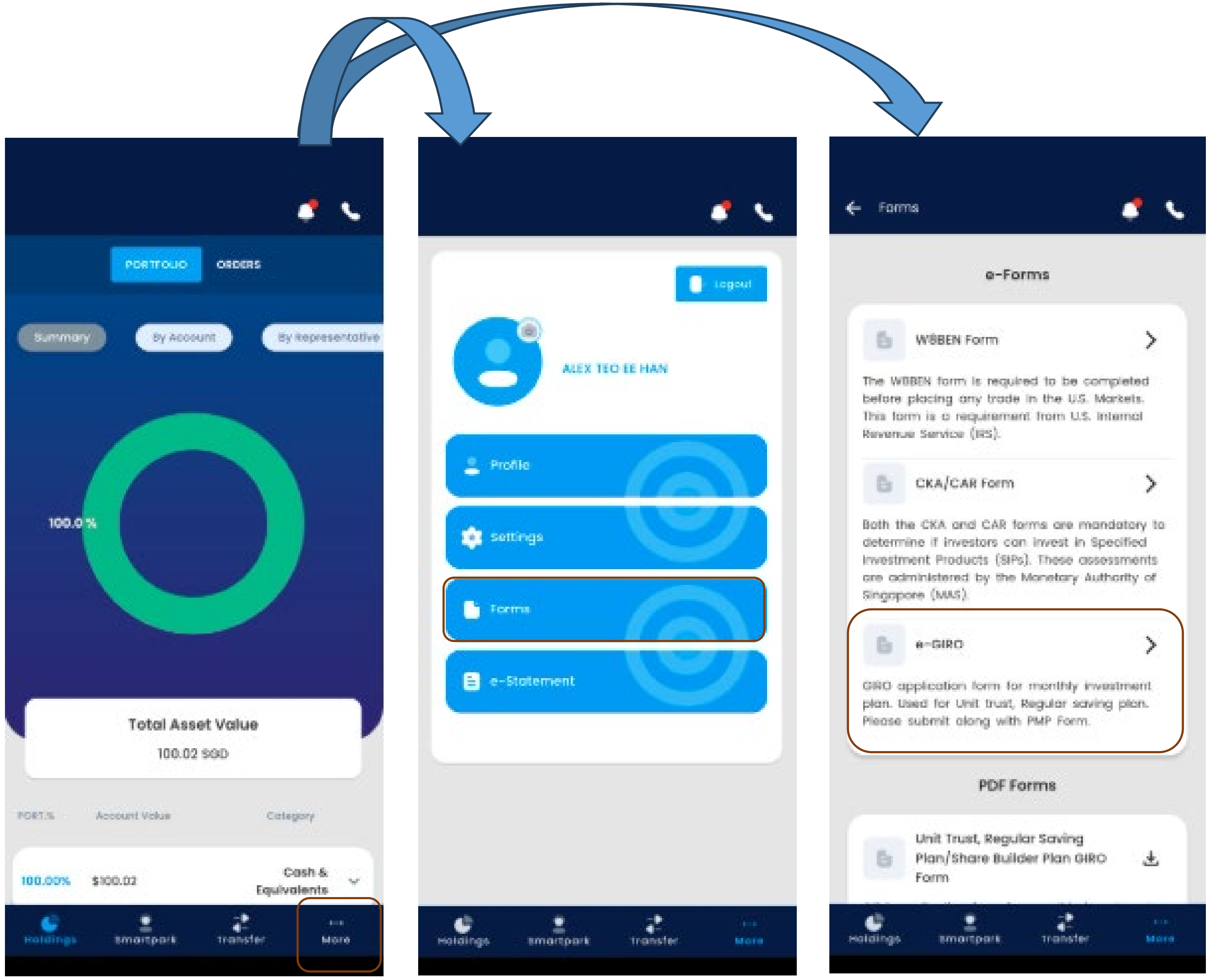
Clients can initiate deposits and withdrawals

Withdrawals through the app are supported for Wrap and Non-Wrap accounts only



eGIRO

- After logging in, select ‘More’
- Select ‘Forms’
- Select ‘e-GIRO’



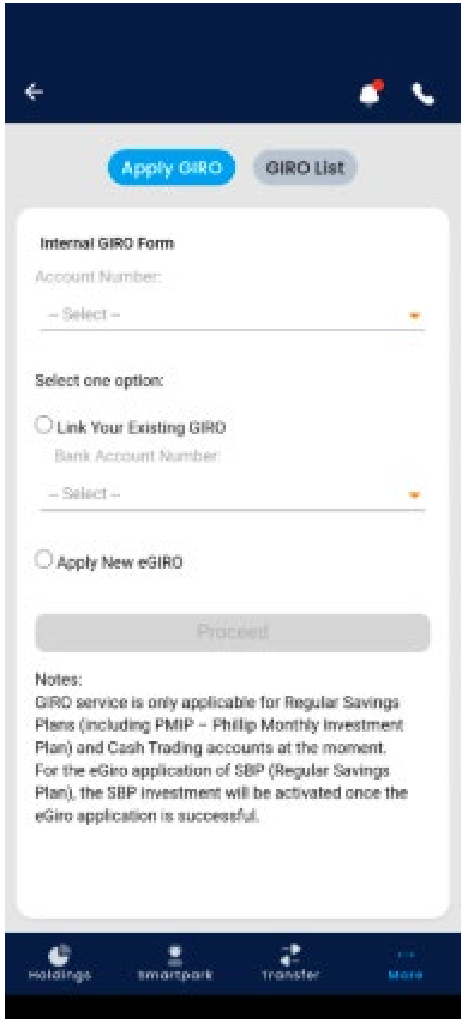
Apply eGIRO

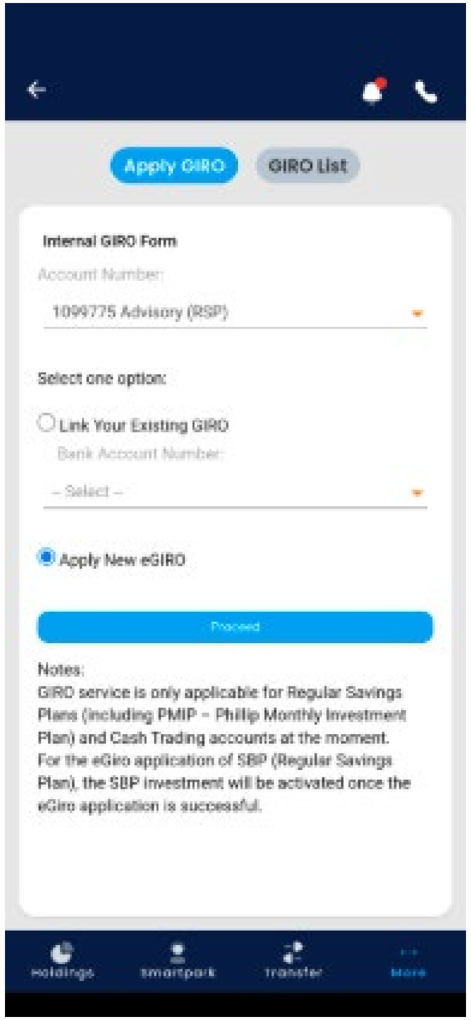
- Select an account
    - Please note, only CASH fund source accounts will show

- Apply New eGIRO linkage

  or

- Use an existing linkage

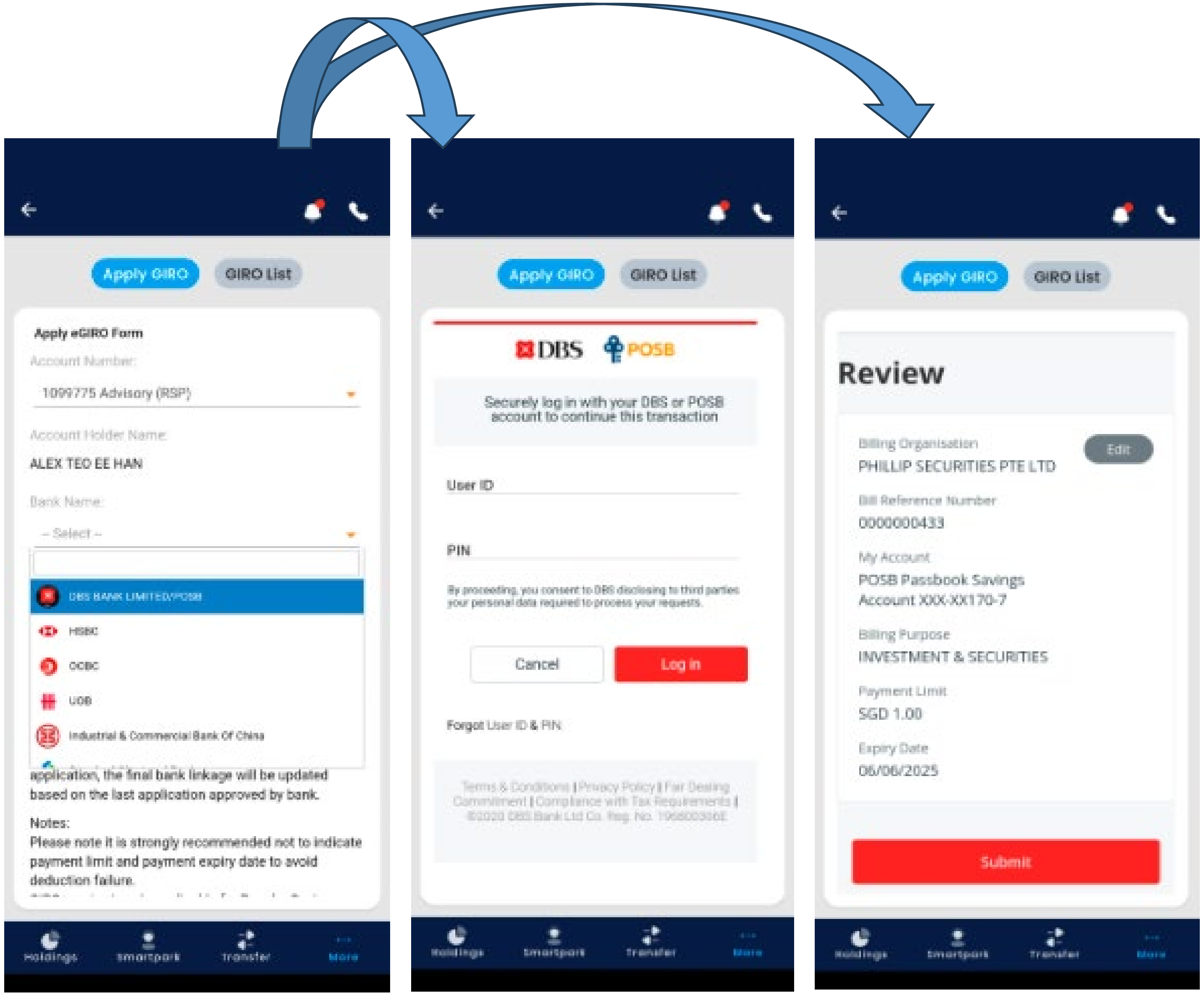




Apply New eGIRO

- Select Bank of Choice and proceed
  - Please note, if bank is not supported, default GIRO form is required

- Login to your internet banking and input the details,
  1. Account to deduct from,
  2. Payment Limit,
  3. and expiry date (if any)



Approved

- After submitting the eGIRO linkage, you can proceed to GIRO List to view the current statuses
- Successful linkage is near immediate