

MyWealth Mobile App User Guide

For



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>

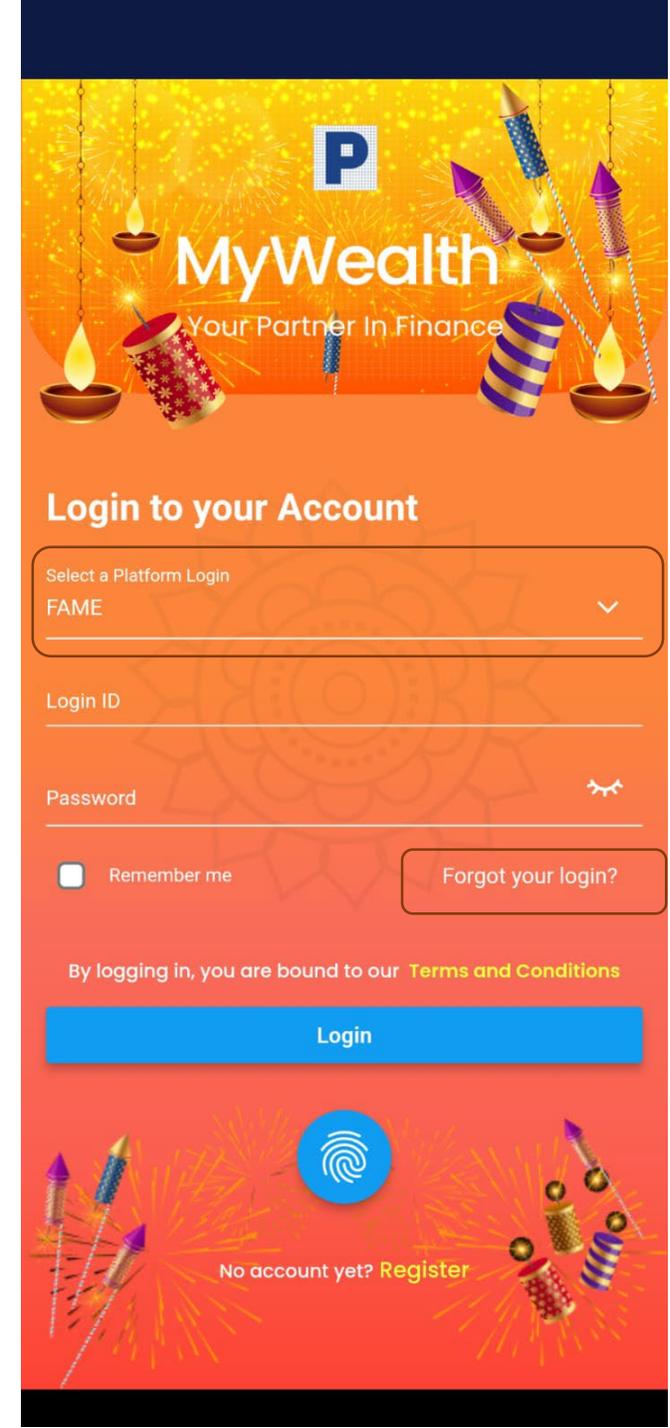
- For Android Devices:

<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

← Forgot Login Credentials

Please provide the following details in order for us to proceed with your initial login setup.

Last 4 characters of NRIC/Passport No/FIN

Date of Birth

Account No i I am a Advisor

XXXXX

Proceed

← Forgot Login Credentials

Please provide the following details in order for us to proceed with your initial login setup.

Last 4 characters of NRIC/Passport No/FIN

Date of Birth

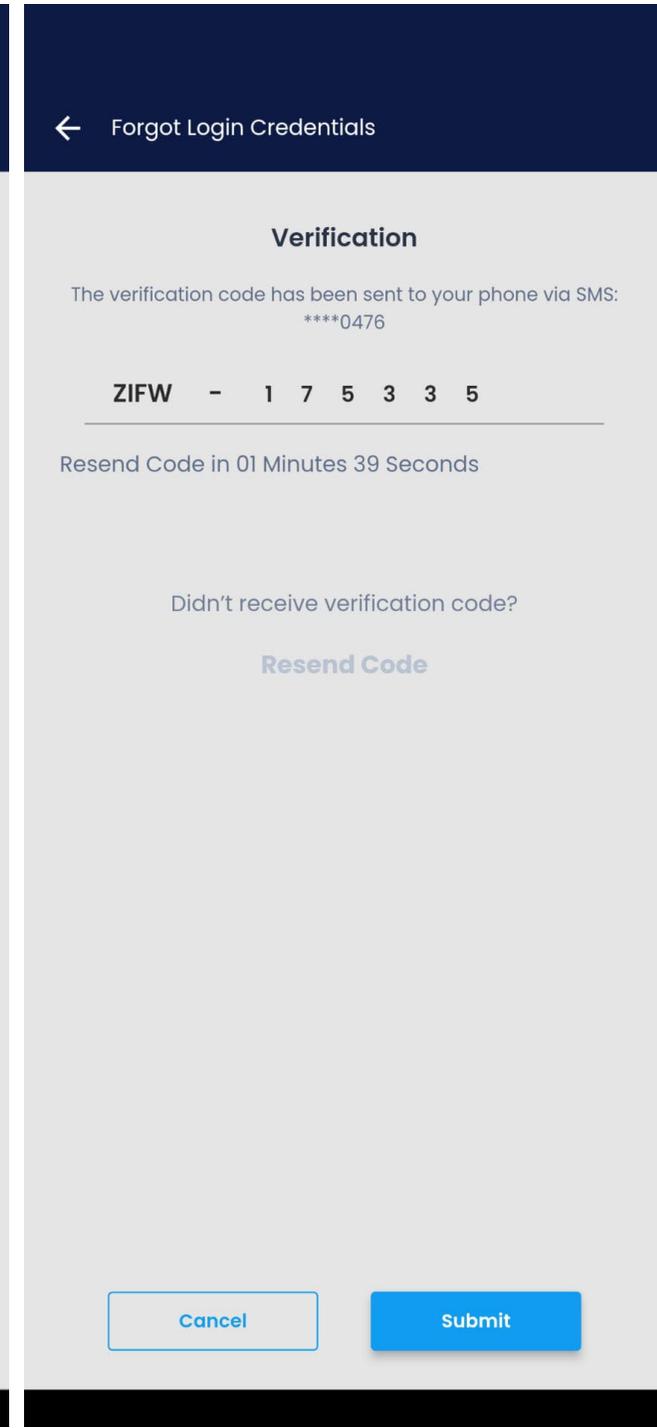
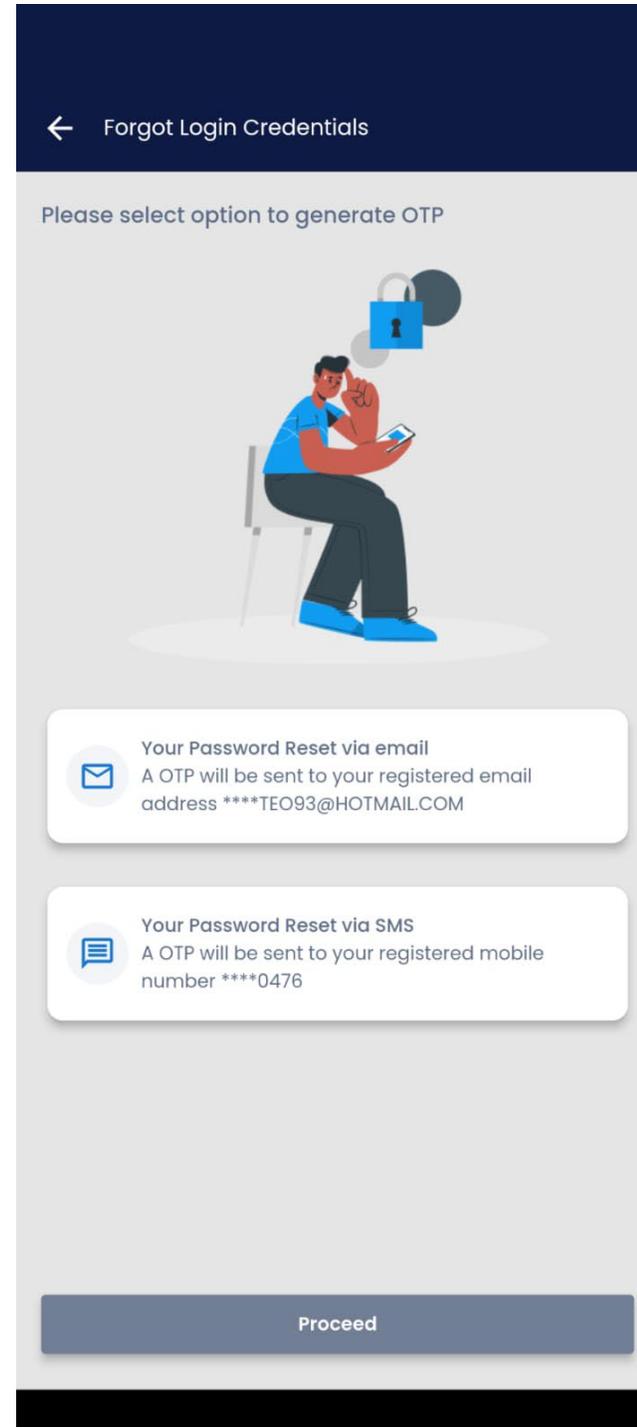
Advisor Code i I am a Advisor

XXXXX

Proceed

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

← Forget Login Credentials

Please follow the instructions to reset your password



Your login ID ✓

New Password ✗

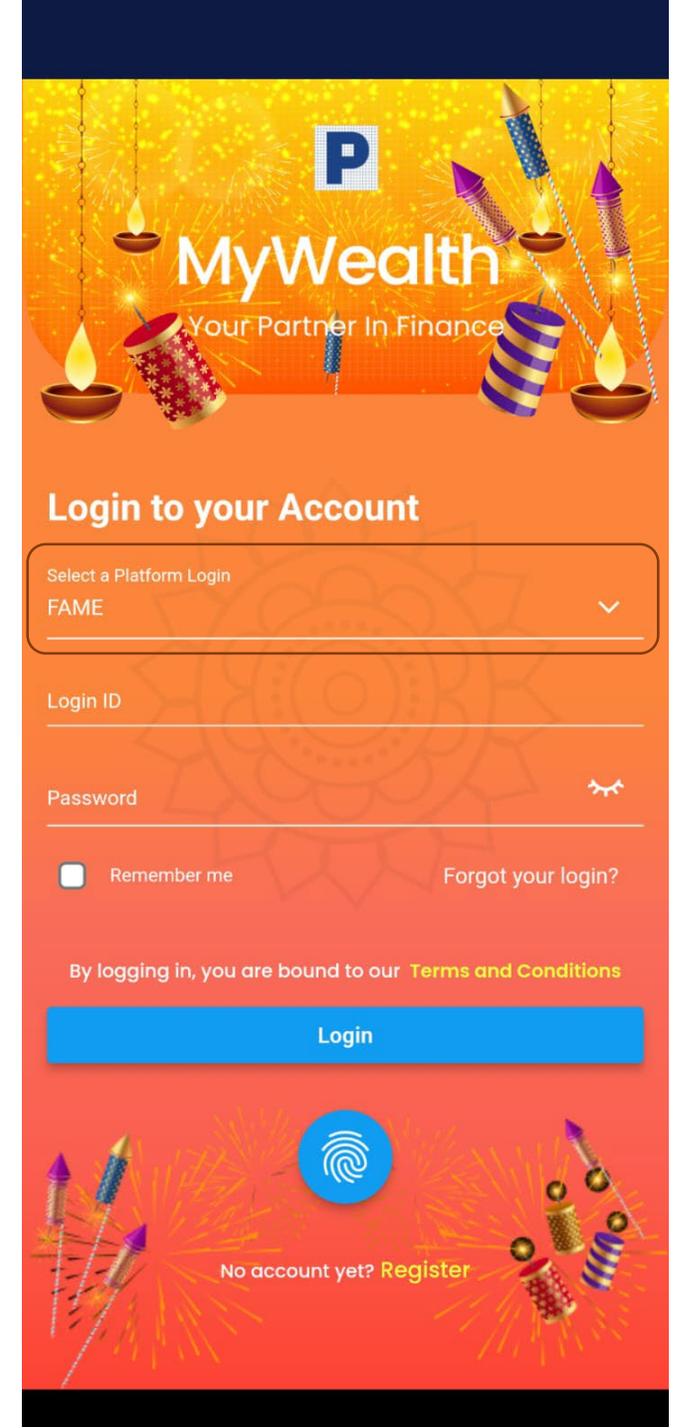
Confirm Password ✗

- ✓ Must contain minimum 8 character alphanumeric characters
- ✓ At least one lower case
- ✓ At least one upper case
- ✓ At least one numeric character
- ✓ Password matches with Confirm Password

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.



The image shows a mobile application login screen for MyWealth. The background is a vibrant orange and red gradient with a subtle pattern of Diwali lanterns and fireworks. At the top, there is a blue square with a white 'P' logo, followed by the text 'MyWealth' and 'Your Partner In Finance'. Below this, the heading 'Login to your Account' is displayed. The login form includes a dropdown menu for 'Select a Platform Login' with 'FAME' selected, a 'Login ID' input field, and a 'Password' input field with an eye icon for toggling visibility. There are checkboxes for 'Remember me' and a link for 'Forgot your login?'. A blue 'Login' button is positioned below the form. At the bottom, there is a fingerprint icon and the text 'No account yet? Register'.

P
MyWealth
Your Partner In Finance

Login to your Account

Select a Platform Login
FAME

Login ID

Password

Remember me [Forgot your login?](#)

By logging in, you are bound to our [Terms and Conditions](#)

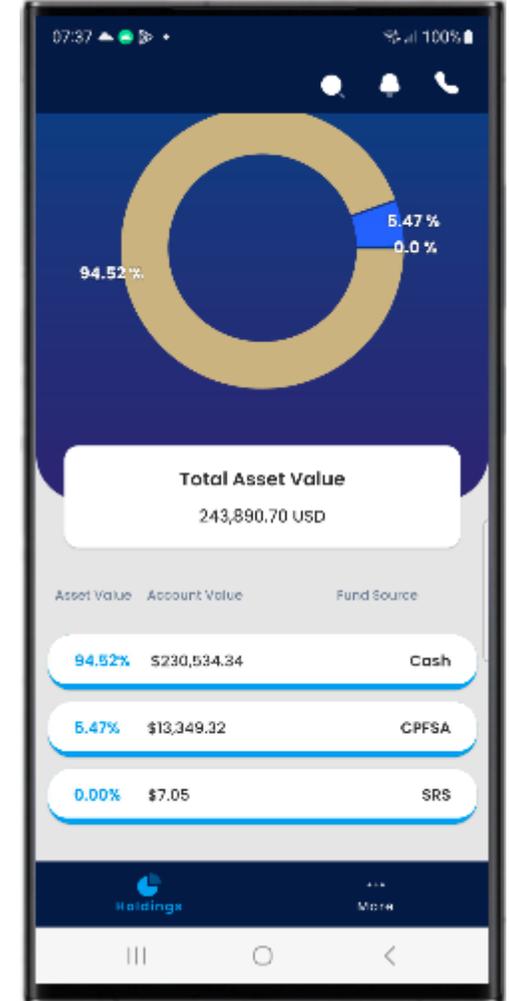
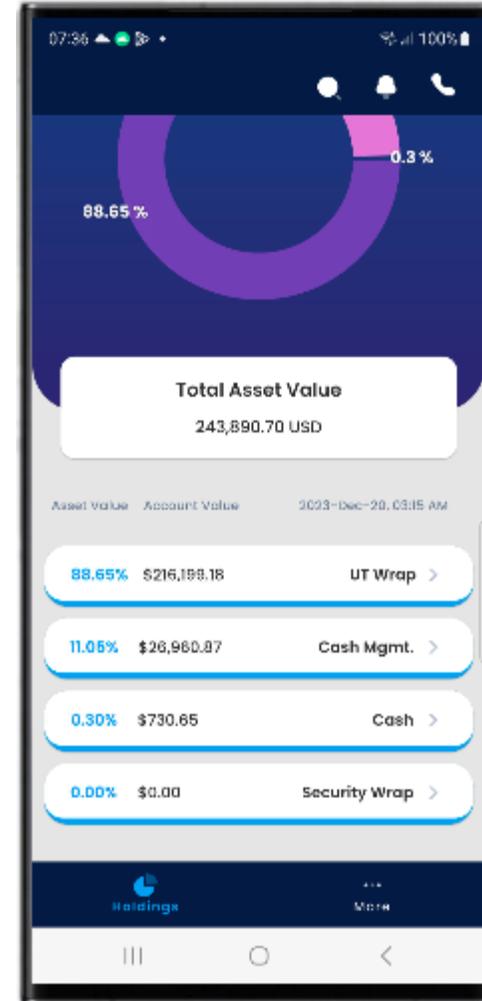
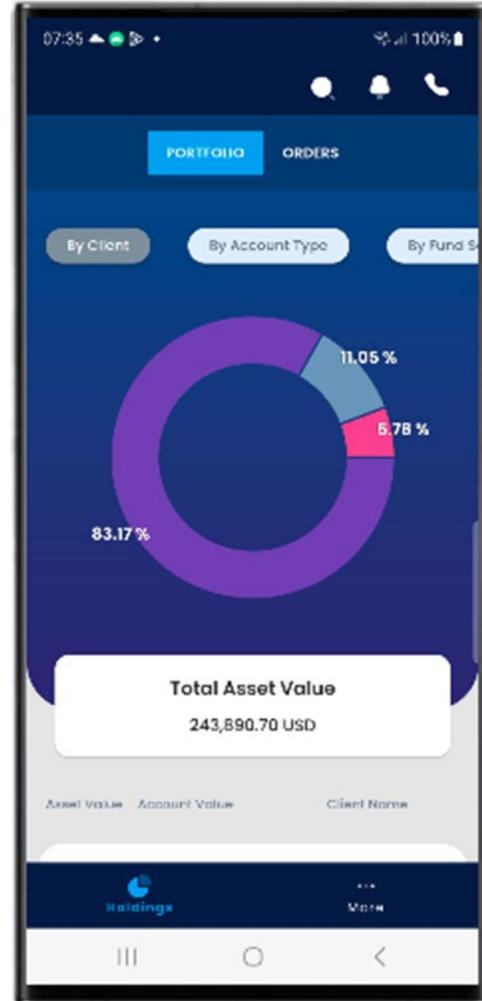
Login

 No account yet? [Register](#)

Portfolio Summary (Homepage)

You will be able to view your AUM summary.

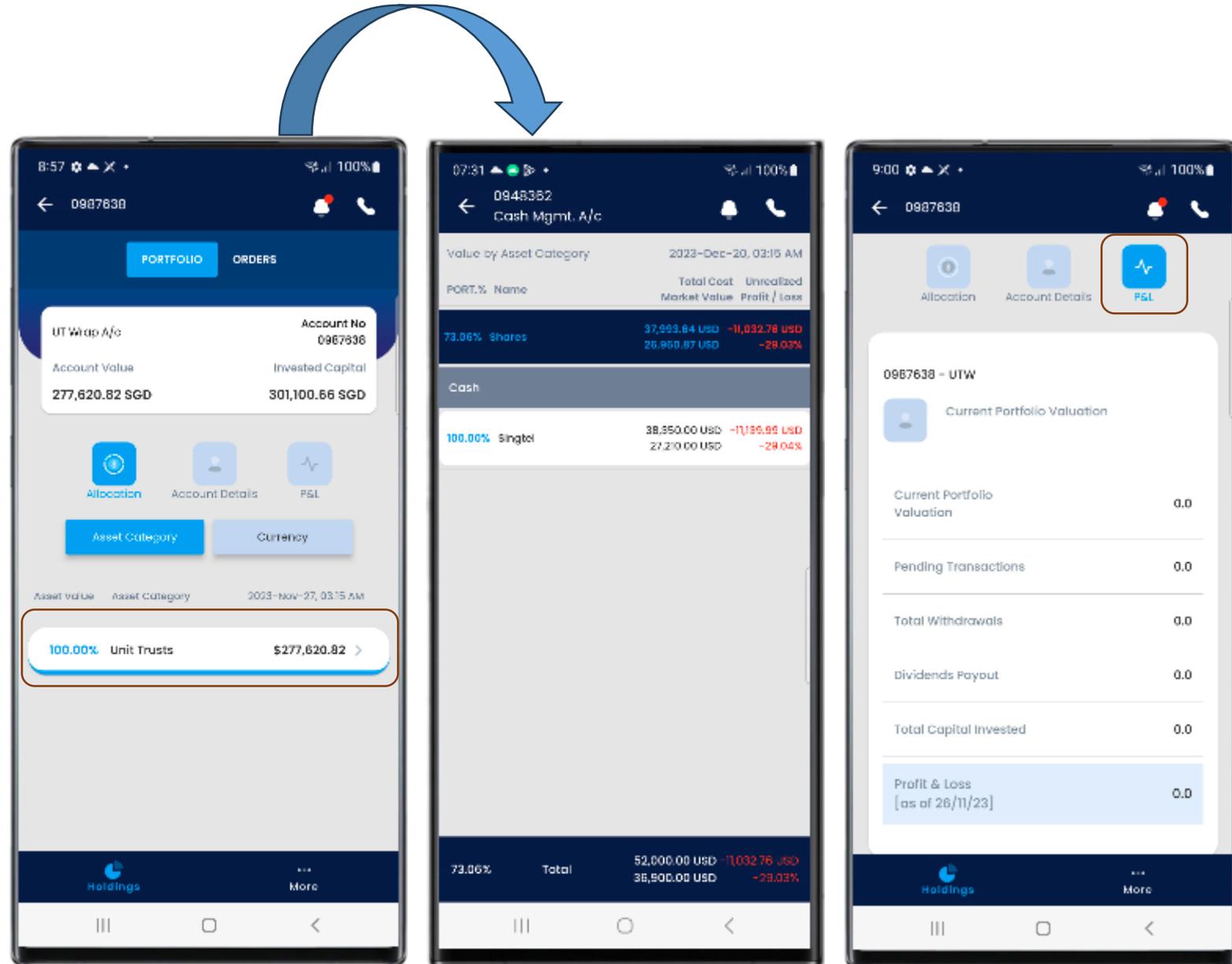
Further breakdown by client, account type, fund source, and currency is available.



Account Details

More details can be found after selecting the account.

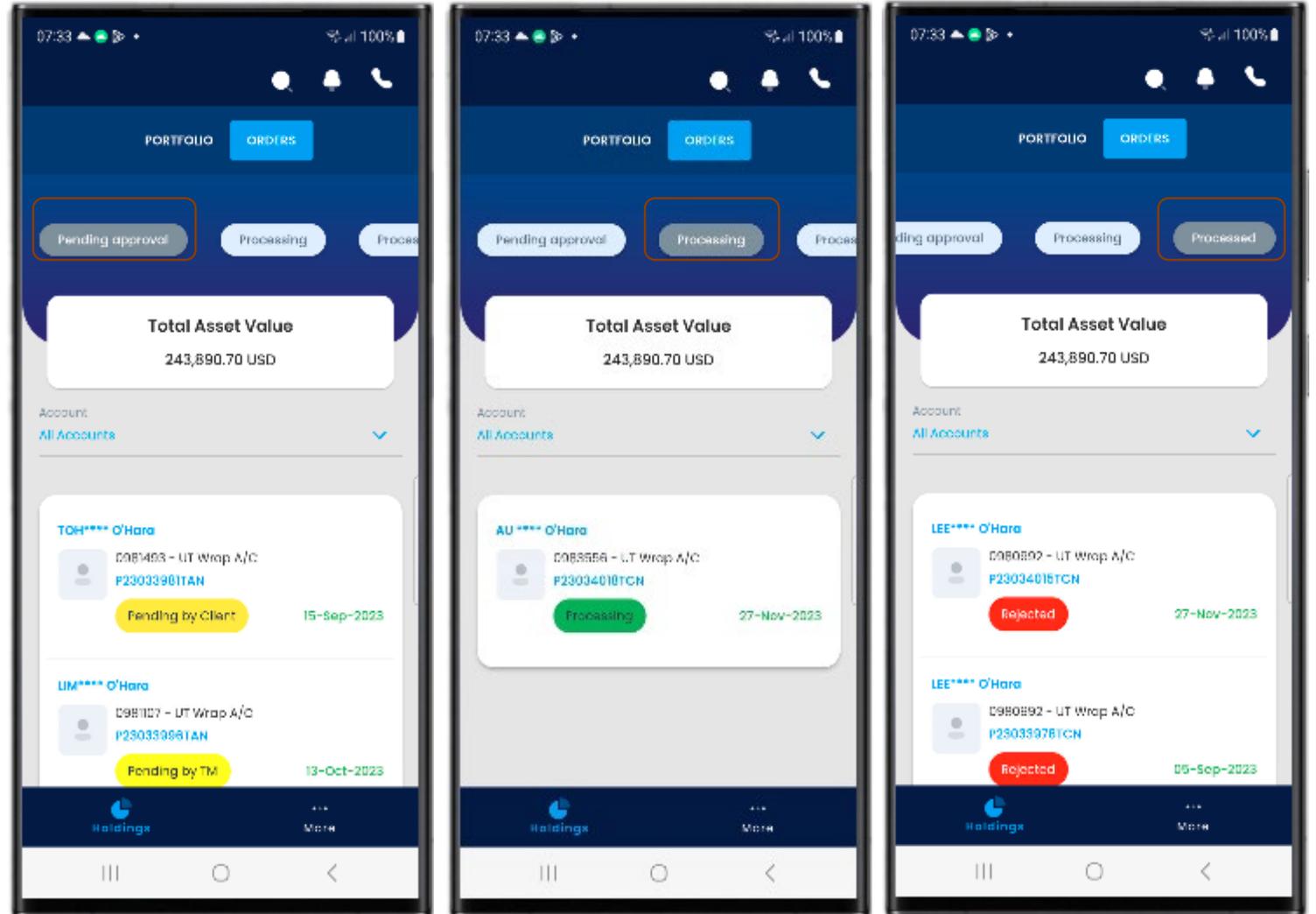
Including detailed account holdings and Profit and Loss table (P&L)



Orders Tab

Allows users to track any orders pending approval.

Track orders under processing and past orders processed.

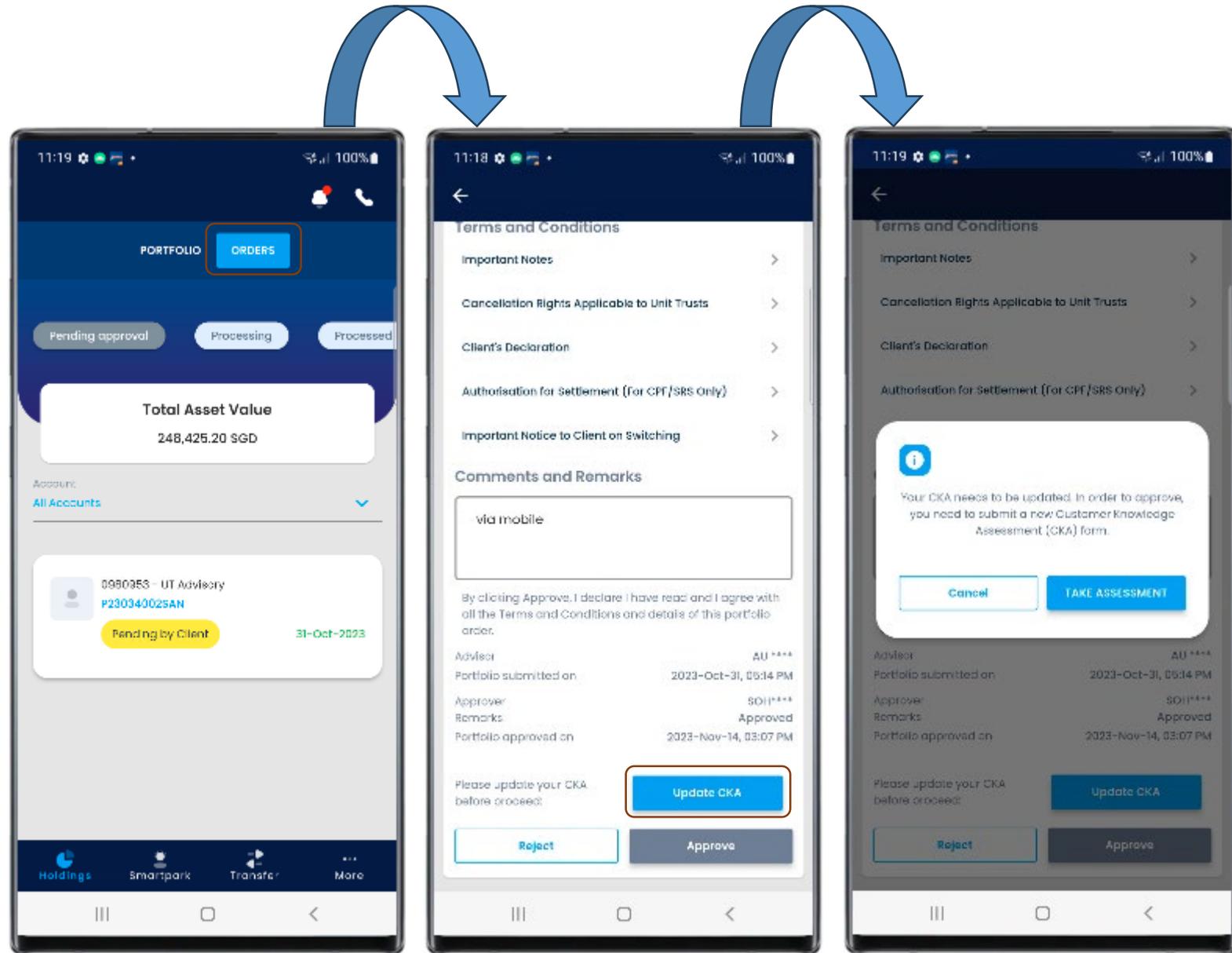


Orders Tab cont

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

Order details reflect what was created on FAME

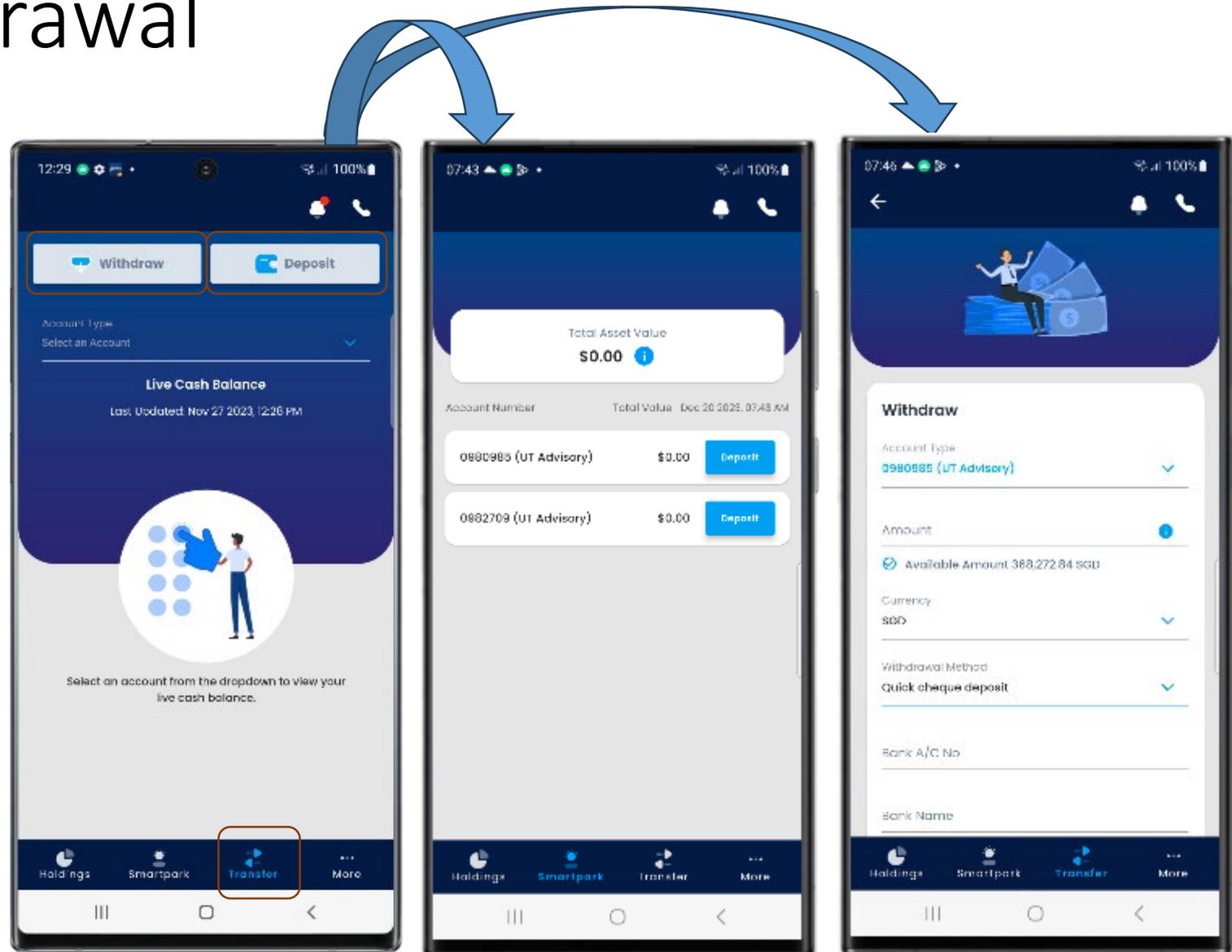
Client Knowledge Assessment (CKA) is completed within the app prior to approval



Deposit & Withdrawal

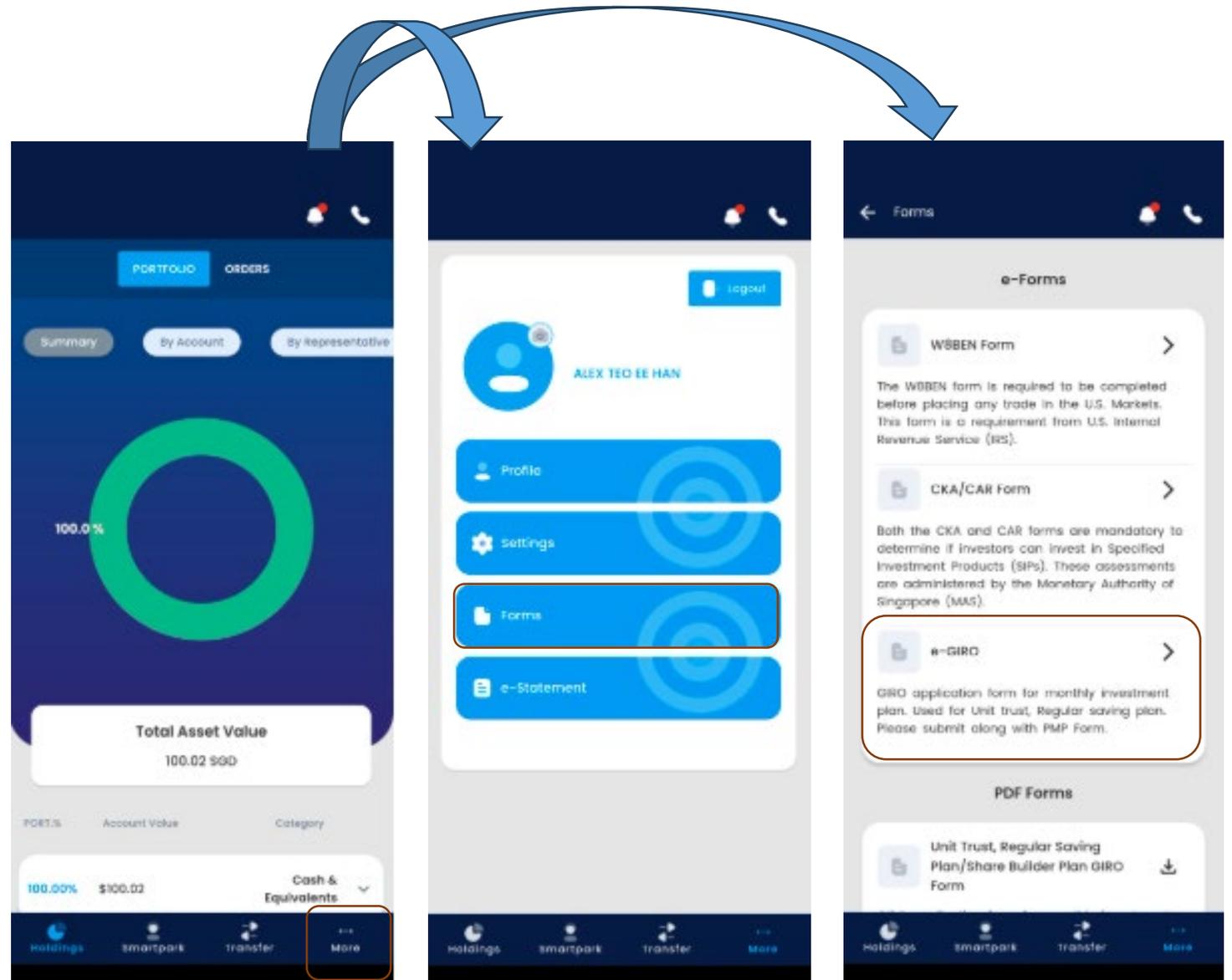
Clients can initiate deposits and withdrawals

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

Internal GIRO Form

Account Number:
- Select -

Select one option:

Link Your Existing GIRO
Bank Account Number:
- Select -

Apply New eGIRO

Proceed

Notes:
GIRO service is only applicable for Regular Savings Plans (including PMIP - Philip Monthly Investment Plan) and Cash Trading accounts at the moment. For the eGiro application of SBP (Regular Savings Plan), the SBP investment will be activated once the eGiro application is successful.

Internal GIRO Form

Account Number:
1099775 Advisory (RSP)

Select one option:

Link Your Existing GIRO
Bank Account Number:
- Select -

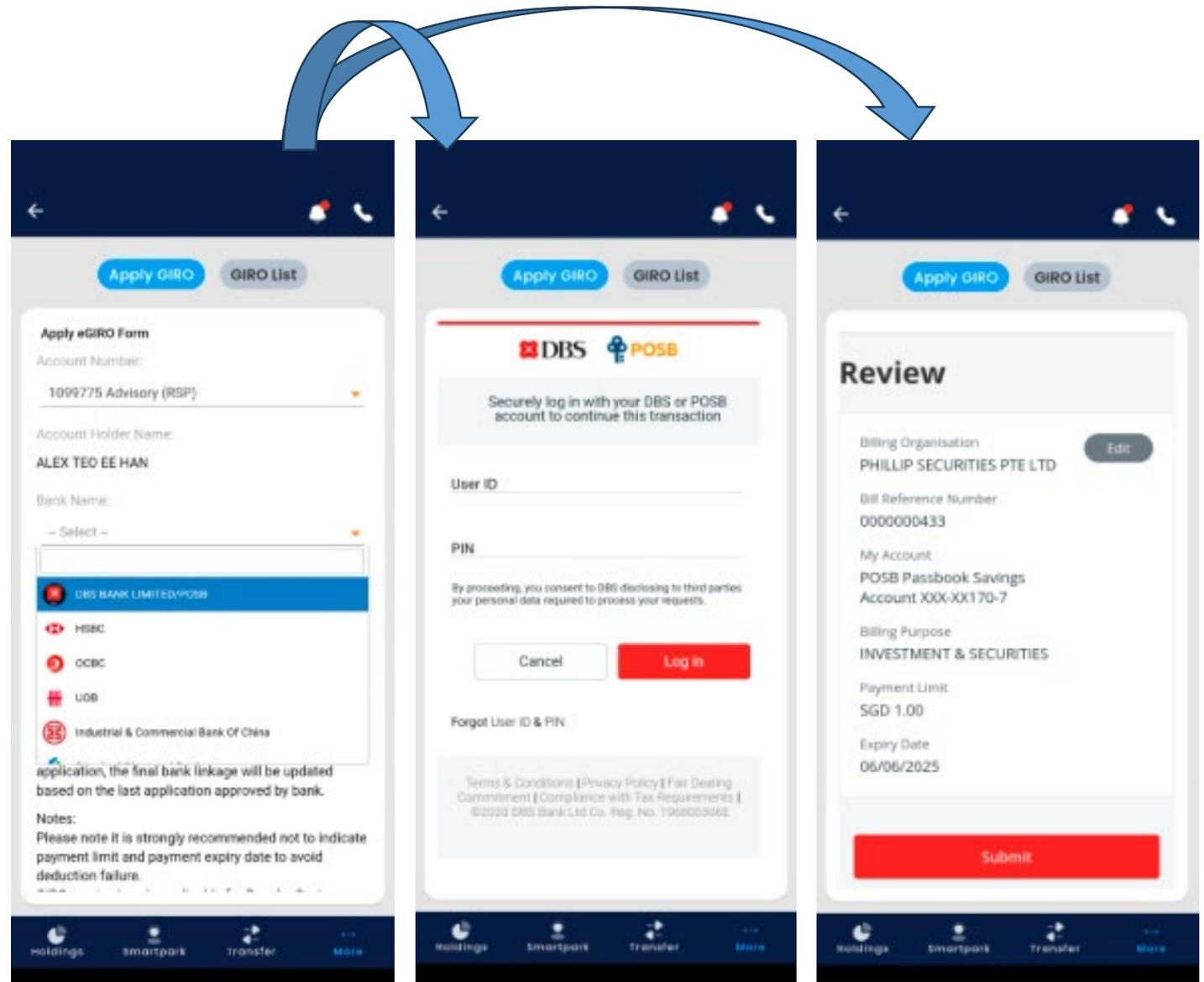
Apply New eGIRO

Proceed

Notes:
GIRO service is only applicable for Regular Savings Plans (including PMIP - Philip Monthly Investment Plan) and Cash Trading accounts at the moment. For the eGiro application of SBP (Regular Savings Plan), the SBP investment will be activated once the eGiro application is successful.

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

