

AMG Online Service

User Guide _{For} Client

Version 1.0

Last Updated in Mar 2018



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Introduction

This user guide is intended to introduce the client servicing functions on the AMG Online Service, below are the features covered in this user guide.

- **Ø** Portfolio Report
- Change Password

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Chapter 1 Portfolio Report

This function allows user to view the latest portfolio, including account valuation, coverage/premium details and asset allocation (if any).

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Logaut	Client Name Account Tille	Client / Act14D	Consultant	Service / Plan Marter	Portfutio Report
	Peter Chan			FTL/In Oscar	10 M

• Click "¹" to view the online portfolio valuation. User may also click on "²" to download the valuation in PDF format

Client Name / Account Title	Clie	nt / Acct ID		Cansultant		Service / Plan Name		Portfolio Se
r Chan					FTLife Oscar	Online Pe	rtfolio Report	-
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Hostar Peter Chain p ince Company FTL:lle insurance Company Limited ct Name FTL:lle Dacar Namber								
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um Term 25 Years um Mode Monthly Lan Amount								
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Name of Interstment Choice	Amobutiae)	Valuation Date	Latest U	hit Price	No. of Units	IPlan Currencel	iReg	HKD orting Currency)
derdeen Global Asian Smaller Companies Fund A2 Acc Bhares	10.34%	2018-02-26	USD	48.8056				
lackRock Global Funds Emerging Europe Fund A2 Shares	10.25%	2018-02-26	USD	136,9300				
Idelly Funds Funders Grants Fund & Shares	8.90%	2010-02-20	FUR	42,2000				
ind State Global Umbretta Fund pic Finit State Asian Growth Fund Class LAcc	14.62%	2018-02-26	USD	48.3700				
lanus Henderson Horizon Fund China fund	9.79%	2018-02-26	U5D	24.7600				
Ismpleton Global Total Return Fund A Acc Shares	25 52%	2018-02-26	USD	30.4500				
Asive Partners High-Dividend Stocks Fund A1 Class	9.85%	2018-02-26	USD	98.2500	Portfolio Value:			
In progress transactions.						Performance Chart	WhiteBDX Promotion	Code: Ref WMCube-2
Asset Allocation								
	10.75%		9.98%	-	an American Street and All			
	10.25%		36/%	Acc Shares BlackRock Global Fur	nda Emerging Europe Fund A2			
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Click on "
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to view the consolidated asset report. •

	Client / Acct ID	Goowitant	Service / Plan N	ane .	Portfolio	Repar
r Chan		FTL/e Oscer	Consolidates	Asset Report		
stomer Name : Peter Chan porting Currency : HKD •						
Total Sum Assured						
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Account Valuation			1			
Account Valuation	Fund	Asset Class	Holding %		Latest Price	
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Account Valuation FTLife BlackRock Global Funds World Mining Fu FTLife Aberdeen Global Asian Smaller Companie FTLife Fidelity Funds European Growth Fund A S FTLife Fieldity Funds European Growth Fund A S FTLife First State Global Umbrelia Fund plc First FTLife Janus Henderson Horizon Fund China fur FTLife Value Partners High-Dividend Stocks Fund	Fund nd A2 Shares se Fund A2 Acc Shares e Fund A2 Shares Shares State Asian Growth Fund Class I Acc rd d A1 Class	Asset Class Commodity & Energy Equity	Holding % 9.96% 10.14% 10.25% 9.87% 14.82% 9.79% 9.85%	USD USD USD EUR USD USD USD	Latest Price 42 48 135 14 48 24 88 24 98	2.250 8.805 9.910 9.370 1.760 1.250

FTLife Prist State Global Officientia Fund pic Frist State Asian FTLife Janus Henderson Horizon Fund China fund FTLife Value Partners High-Dividend Stocks Fund A1 Class FTLife Templeton Global Total Return Fund A Acc Shares 9.79% USD 9.85% USD 25.52% USD Fixed Interest

* In progress transactions.





• Click " to view portfolio report in PDF format.

Client	t Name / Account Title	Client /	Acct ID	Consu	Aant		Service / Plan Name	Portfolio Report
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*1			Ĩ	报告货币		- Sector	港元	
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划货币 到 <u>生</u> 效日期	港元 2018年1月							
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户捐要	投资选择名称	结余比重	估值日期	最新单位价格	单位数目	投资选择结余		
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於德全球基金世界	省"业基金A2股份	9,96%	2018年2月26日	英元				
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城环球中于基金有	/限公司首城亚洲增长基金类别1累积	14.82%	2018年2月26日	美元				
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Chapter 2 Change Password

This function allow user change the system password and must fulfill below requirement

- Cannot reuse previous password
- At least 8 character and containing both numeric and alphabetic characters
- The first and last characters must not be numeric character
- Click on the user information button to open the user panel

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• •	n user panel, click on change password button	

- On user panel, click on change password button
 User Information
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- Input existing and new password on the pop up change password window and click the submit button

Old Password	
New Password	
Confirm Password	

Complete





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