

# *AMG Online Service*

## *User Guide For Client*

*Version 1.0*

Last Updated in Mar 2018


## Content

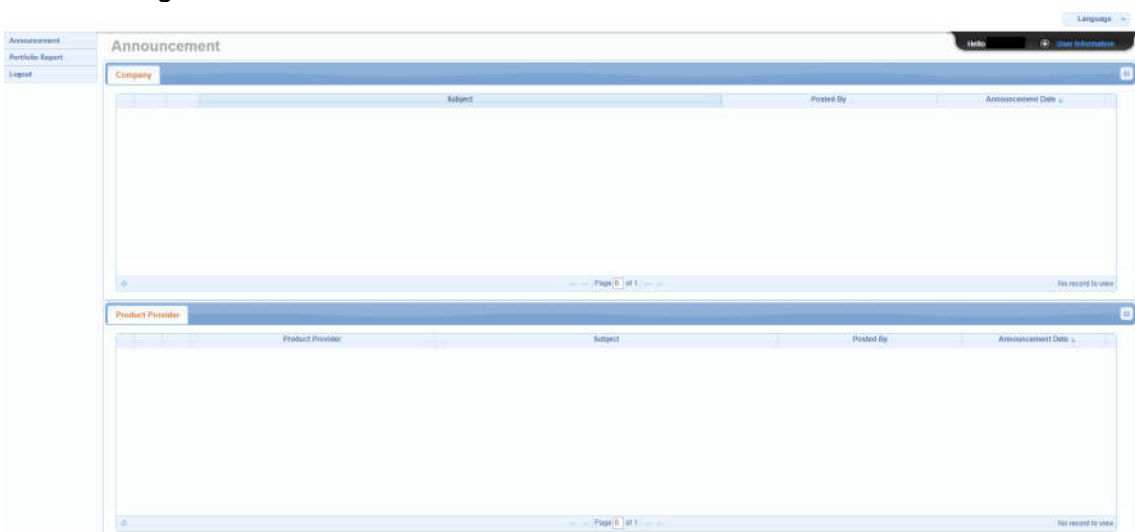
Introduction.....	3
Chapter 1 Portfolio Report.....	4
Chapter 2 Change Password.....	7

## 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.

 Portfolio Report



 Change Password



# Chapter 1 Portfolio Report

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



- Click “” to view the online portfolio valuation. User may also click on “” to download the valuation in PDF format




- Online portfolio valuation

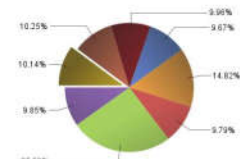
**Policy Holder**  
 Peter Chan  
 Insurance Name: FTLife Insurance Company Limited  
 Product Name: FTLife Oscar  
 Policy Number: HKD  
 Policy Currency: HKD  
 Commencement Date: 2018-01  
 Maturity Date: 2043-01  
 Premium Term: 25 Years  
 Premium Mode: Monthly  
 Premium Amount:  
 Total Contribution:

Name of Investment Choice	Weight(%)	Valuation Date	Latest Unit Price	No. of Units	Investment Choice Balance In	
					HKD (Plan Currency)	HKD (Reporting Currency)
Aberdeen Global Asian Smaller Companies Fund A2 Acc Shares	10.14%	2018-02-26	USD	48.6056		
BlackRock Global Funds Emerging Europe Fund A2 Shares	10.25%	2018-02-26	USD	138.9300		
BlackRock Global Funds World Mining Fund A2 Shares	9.96%	2018-02-26	USD	42.2900		
Fidelity Funds European Growth Fund A Shares	9.67%	2018-02-26	EUR	14.9100		
First State Global Umbrella Fund plc First State Asian Growth Fund Class I Acc	14.82%	2018-02-26	USD	48.3700		
Janus Henderson Horizon Fund China fund	9.79%	2018-02-26	USD	24.3600		
Templeton Global Total Return Fund A Acc Shares	25.52%	2018-02-26	USD	10.4500		
Value Partners High-Dividend Stocks Fund A1 Class	9.85%	2018-02-26	USD	98.2500		

\* In progress transactions


Performance Chart  Promotion Code: Ref WMCube 2018


**Asset Allocation**



- Aberdeen Global Asian Smaller Companies Fund A2 Acc Shares: 10.14%
- BlackRock Global Funds Emerging Europe Fund A2 Shares: 10.25%
- BlackRock Global Funds World Mining Fund A2 Shares: 9.96%
- Fidelity Funds European Growth Fund A Shares: 9.67%
- First State Global Umbrella Fund plc First State Asian Growth Fund Class I Acc: 14.82%
- Janus Henderson Horizon Fund China fund: 9.79%
- Templeton Global Total Return Fund A Acc Shares: 25.52%
- Value Partners High-Dividend Stocks Fund A1 Class: 9.85%

Please note that the sectors and the legends of the chart are ordering in the same manner with the top sector as the starting point.

- Click on “” to view the consolidated asset report.

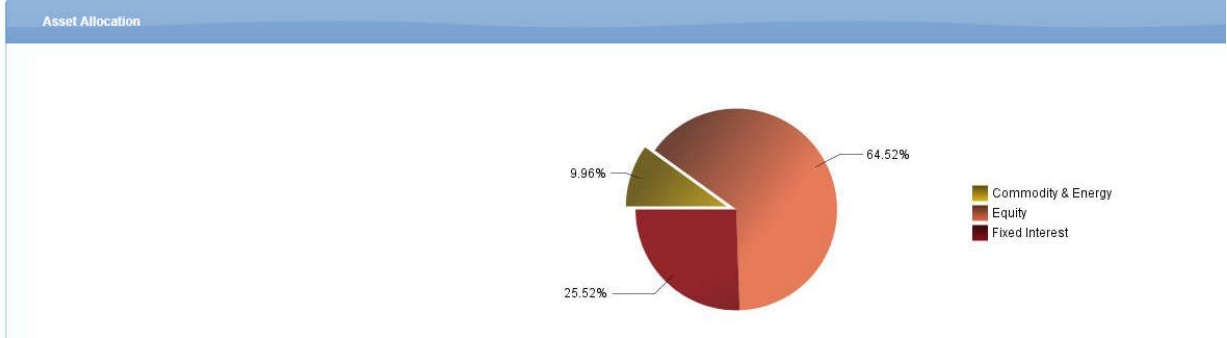
Client Name / Account Title	Client / Acct ID	Consultant	Service / Plan Name	Portfolio Report
Peter Chan			FTLife Oscar	<a href="#">Consolidated Asset Report</a> 

Customer Name : Peter Chan  
Reporting Currency : HKD

Total Sum Assured
Total Sum Assured : HKD 0.00

Fund	Asset Class	Holding %	Latest Price
FTLife BlackRock Global Funds World Mining Fund A2 Shares	Commodity & Energy	9.96% USD	42.2500
FTLife Aberdeen Global Asian Smaller Companies Fund A2 Acc Shares	Equity	10.14% USD	48.8056
FTLife BlackRock Global Funds Emerging Europe Fund A2 Shares		10.25% USD	136.9300
FTLife Fidelity Funds European Growth Fund A Shares		9.67% EUR	14.9100
FTLife First State Global Umbrella Fund plc First State Asian Growth Fund Class I Acc		14.82% USD	48.3700
FTLife Janus Henderson Horizon Fund China fund		9.79% USD	24.7600
FTLife Value Partners High-Dividend Stocks Fund A1 Class		9.85% USD	98.2500
FTLife Templeton Global Total Return Fund A Acc Shares	Fixed Interest	25.52% USD	30.4500

\* In progress transactions.



- Click “” to view portfolio report in PDF format.

Client Name / Account Title	Client / Acct ID	Consultant	Service / Plan Name	Portfolio Report
Peter Chan			FTLife Oscar	<a href="#">View Portfolio Report in PDF Format</a>

### 投资计划估值报告(ILAS)

日期 : 2018年3月5日  
 报告货币 : 港元  
 参考编号 : [ ]

**计划持有人姓名**  
**计划供应商名称** 富通保险有限公司  
**计划名称** 富通闪耀人生  
**计划编号**  
**计划货币** 港元  
**计划生效日期** 2018年1月  
**计划期满日期** 2043年1月  
**计划年期** 25年  
**供款模式** 每月  
**每期供款**  
**已缴供款**

#### 帐户摘要

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	
					港元 (计划货币)	港元 (报告货币)
安本环球亚洲小型公司基金A2收益累积股份	10.14%	2018年2月26日	美元			
富达基金欧洲增长基金A类别股份	9.67%	2018年2月26日	欧元			
惠理高息股票基金A1类别	9.85%	2018年2月26日	美元			
贝莱德全球基金世界矿业基金A2股份	9.96%	2018年2月26日	美元			
贝莱德全球基金新兴欧洲基金A2股份	10.25%	2018年2月26日	美元			
富晋环球总收益基金A类别累积股份	25.52%	2018年2月26日	美元			
首域环球种子基金有限公司首域亚洲增长基金类别 I 累积	14.82%	2018年2月26日	美元			
骏利亨德森远见中国跃升基金	9.79%	2018年2月26日	美元			

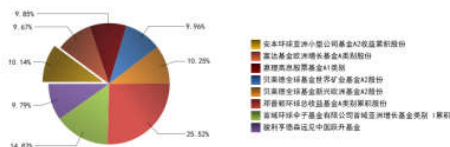
投资组合价值

\* 处理中之交易。

### 投资计划估值报告(ILAS)

日期 : 2018年3月5日  
 报告货币 : 港元  
 参考编号 : [ ]

#### 投资选择分配



请注意本图表以拉出的板块作为排列起点(顺时针方向)，板块及解说的排列次序是一致的。

#### 重要声明：

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对于实际的单位数量及客户持有量的估值，请参阅保险公司所提供的每月/季/年度估值报表。

如果您有任何疑问或在报表中发现任何不准确的信息，请尽快与您的理财顾问联络。

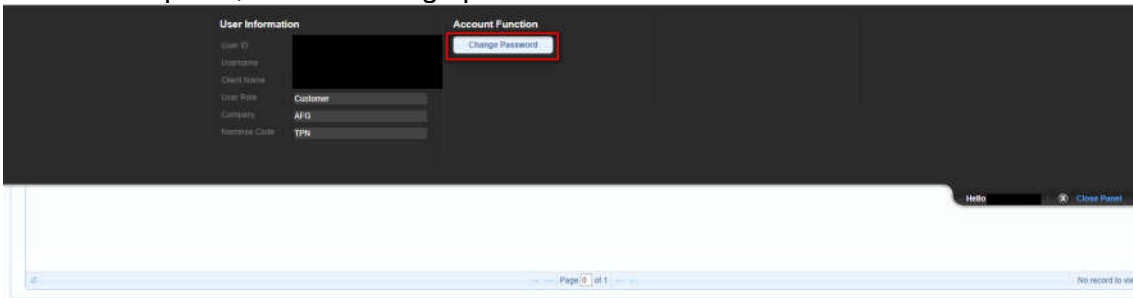
## Chapter 2 Change Password

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



- On user panel, click on change password button



- Input existing and new password on the pop up change password window and click the submit button



The 'Change Password' dialog box contains three input fields: 'Old Password', 'New Password', and 'Confirm Password', each with a masked password field. At the bottom, there are 'Submit' and 'Cancel' buttons, with the 'Submit' button highlighted by a red box.

- Complete



The 'Change Password' dialog box now displays the message 'Change Password Successful.' at the bottom. The 'Submit' button is no longer visible, and the 'Back' and 'Cancel' buttons are present at the bottom.

*The End*