
Quick Start Guide

FAME 2

Singapore



Clients' Navigation Guide

TABLE OF CONTENTS

1. LOGGING IN TO THE SYSTEM	3
2. VIEW ACCOUNT HOLDINGS	7
3. APPROVE TRANSACTION PORTFOLIO	8
4. VIEW PORTFOLIO STATUS.....	10
5. VIEW TRANSACTION DETAILS	11
6. UPDATE CKA	12

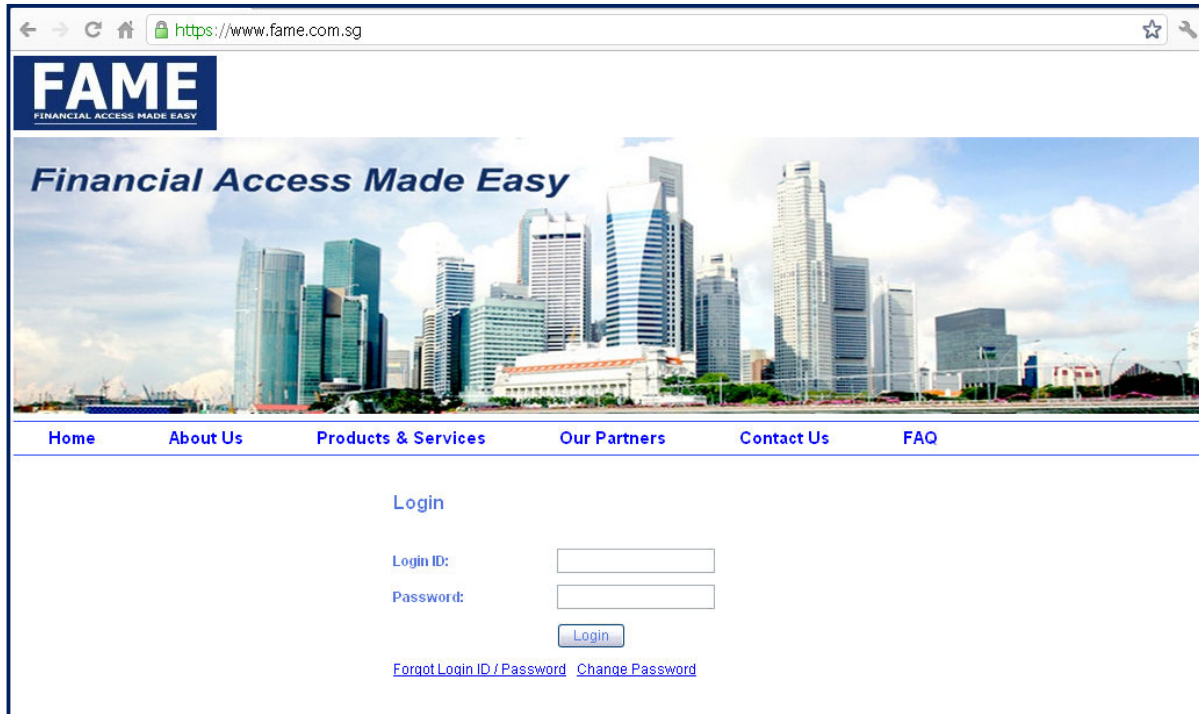
1. Logging In to the System

1.1 Introduction

1. Before using the functions of the system, you will first have to log in with your provided login ID and password.

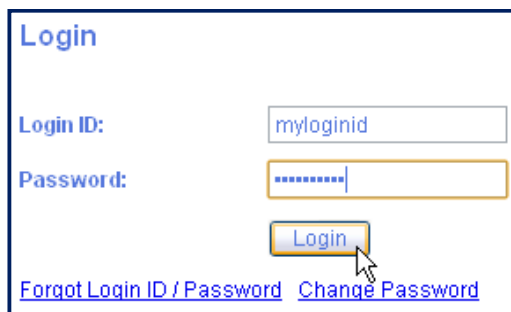
1.2 Steps

1. Navigate to the **FAME 2 website** at <https://www.fame.com.sg>



Screen: FAME 2 Login Page

2. Enter your **Login ID** and **Password** in the respective fields. Please note that your password is case-sensitive.
3. Click on the **Login** button.



Screen: Login ID and Password Fields

1.3 New Login

1. If this is your **first time** logging in to FAME, you will be redirected to a page where you can change your login ID. This change is optional.
2. You will also be prompted to **change your password** for security reasons.
3. Select a security question, or enter your own, followed by your own answer to the question. This **security question-and-answer** combination will be used for verification in the event that you need to retrieve your login ID or password (refer to 1.4).

Welcome

For security reasons, your password needs to be changed upon first login.

Login ID:

Current Password:

New Password:

Confirm New Password:

Please choose a security question and answer.
This security question will be asked in the event that you need to retrieve your password.

Question:

Answer:

Screen: First Login Password Change

1.4 Change Password

1. If you want to change your password, you can do it online via the **“Change Password”** link on the login page.
2. Enter your **Login ID** and your **Current Password**.
3. Enter the **new password** that you would like to change to and confirm it.
4. Click on the **“Save”** button to make the change.

Change Password

Login ID:

Current Password:

New Password:

Confirm New Password:

Screen: Change Password Page

1.5 **Forgot Login**

1. If you forgot your login ID or password, you can retrieve them via the **“Forgot Login ID / Password”** link on the login page.
2. You will be prompted to enter your IC number (that was used during account opening) for verification.
3. After clicking on the **“Verify”** button, your security question will be displayed. Enter your answer in the **“Answer”** field.
4. Select the delivery medium for your Login ID and password before proceeding to click on the **“Submit”** button.
5. Your login ID and password will be sent to you via the selected medium.
6. More information on the delivery mediums:
 - a) Successful requests via the encrypted email option will be processed and sent shortly after the request.
 - b) The encrypted email option utilizes a third-party email service which requires registration upon the first visit. Subsequent visit will only require entering a password to view the contents of encrypted emails.
 - c) Successful requests via the secured pin mailer option will be generated and delivered by post on the next working day.
 - d) The secured pin mailer option will generate two separate mailers. One will contain the login ID and the other will contain the login password.

Forgot Login ID / Password

Please enter your IC no. for verification.

IC No.:

Please enter the answer to your security question.

Question: What year did you graduate from secondary school?

Answer:

For added security, your login ID and password will be sent separately via a secured medium.

Please select the medium that you prefer to receive your login ID and password via.

Encrypted email to email address.

Secured pin mailer to mailing address.

Screen: Forgot Login ID/Password Page

1.6 Other Info

1. You should receive your FAME login ID and password within 5 working days from the creation of your first FAME account.
2. Your login account will be suspended after 3 failed login attempts to ensure the security of your account. Please contact your client service officer or system administrator to reset your login account.
3. Passwords are limited to between 8 to 25 alphanumeric characters, and cannot be repeated when changing passwords. Passwords must contain at least an alphabet and a number.
4. Login IDs are limited to between 4 to 25 alphanumeric characters, and must be unique.

2. View Account Holdings

2.1 Introduction

1. You can view the holdings of your accounts on FAME here.

2.2 Steps

1. Navigate to the **Account Management > Account Holdings** page. The holdings of your account will be displayed in the page. If you have more than one account in FAME, the first account in numeric order will be displayed.
2. You can change the displayed account by selecting from the **Account Number** list in the menu on the left of the page.

Product Name	Quantity	Currency	Average Cost	Investment Amount	Investment Amount (SGD)	Last Done Price	Current Value	Current Value (SGD)	% of Portfolio	Profit (SGD)	Profit %
[+] CASH & EQUIVALENTS											
TOTAL					0.00			-9.97	0.0%	0.00	0.0%
[] OTHERS											
UNIT TRUSTS											
GLOBAL											
Unit Trust Fund - SGD	101,515.1700	SGD	1.0116	102,692.75	102,695.34	1.0227	103,819.56	103,819.56	100.0%	1,124.22	1.1%
TOTAL UNIT TRUSTS					102,695.34		103,819.56	103,819.56	100.0%	1,124.22	1.1%
TOTAL					102,695.34		103,819.56	103,819.56	100.0%	1,124.22	1.1%
GRAND TOTAL					102,695.34		103,809.59	103,809.59		1,124.22	1.1%

Screen: Account Holdings Page

2.3 Other Info

1. If any of your accounts have a transaction portfolio pending your approval, you will see a **"Pending Approval"** link beside that account number in the **Account Summary** page.
2. Clicking on the link will direct you to the **Approve** page. (Refer to feature 3.)

Transaction	Account Number	Account Name	Account Type	Payment Mode	Advisor	Firm	Currency	Investment Amount	Current Value	
Pending Approval	0123210	Cash Savings	UT Wrap	Cash	Elle	FA Firm		316,640.40	322,122.79	
	0909090	Child's Education	UT Wrap	Cash	Elle	FA Firm		60,000.00	60,963.87	
	09876543	Retirement Plan	UT Wrap	CPFOA	Elle	FA Firm		48,687.07	49,353.22	
							Total	SGD	425,327.47	432,439.88

Screen: Account Summary Page

3. Approve Transaction Portfolio

3.1 Introduction

1. You can view and approve portfolios pending your approval.

3.2 Steps

1. Navigate to **Transaction > Approve** page.
2. You will see all portfolios pending your approval here.

Transaction – Approve									
Portfolios pending your approval are displayed below. Select a portfolio to view and approve it. View approved portfolios here .									
Portfolio No.	Portfolio Type	Account No.	Account Name.	Account Type	Fund Source	Advisor	Approver	Received Date & Time	Expiry Date & Time
P12000123	Quick Transaction	0123210	Cash Savings	UT Wrap	Cash	Elle	Il Seek	14-03-2012 12:24:20 PM	20-03-2012 12:32:45 PM

Screen: Approve Transaction Page

3. Click on a **Portfolio Number** to view and approve the portfolio.
4. Click on the **checkbox** to confirm that you agree with the portfolio recommended.
5. Click on either the **Approve** button to approve this transaction portfolio, or the **Reject** button to cancel this portfolio.

Transaction – Quick Transaction

Portfolio No: P12000067TAN

Account Details

Name	D001-01	CKA Status	Pass
Account No.	D001-01	Date of Inception	09-12-2010
Account Type	UT Wrap	Payment Mode	Cash

Cash Deposit

Payment Mode	Currency	Amount	Upfront Fee %	Upfront Fee Amount	GST Amount	Amount(less Upfront)
Cash	SGD	1,000.00	0.00	0.00	0.00	1,000.00

Subscription

Funds	Currency	Amount (SGD)	Sales Charge %	GST Amount	Amount less Upfront	Indicative Price	Indicative Units	Dividend Option
Aberdeen Global Emerging Markets Fund	SGD	1,000.00	0.00	0.00	1,000.00	1.8538	539.4325	Reinvest
		1,000.00						

Portfolio Rationale

Paragraph Font Size Color **B I U** abc x x

I hereby declare that I have provided advice to the client and the product is suitable
 I hereby declare that I have provided advice to the client and the product is NOT suitable(please submit as pen and paper portfolio for this option)

Terms and Conditions

The following are all the terms, conditions and regulations that you must read, understand and agree to before approving this portfolio.

[Important Notes](#)

[Cancellation Rights Applicable to Unit Trusts](#)

[Client's Declaration](#)

Comments and Remarks

Font family Font size **B I U** abc A ab

[Advisor]: Demo A,Advisor 001
Portfolio submitted on: 06-11-2012 10:27:16 AM

I understand that I have passed the CKA assessment and have received advice offered to me by my adviser. I have been advised that the investment products that I intend to invest in is/are suitable for me, and I would like to proceed with the investment.
 I have read, understood and agreed to all the terms on all the pages of this portfolio.

Screen: Example of a Quick Transaction Portfolio in FAME 2

4. View Portfolio Status

4.1 Introduction

1. You can view portfolios that are in the pending, processing or processed stage.

4.2 Steps

1. Navigate to **Transaction > Portfolio Status > Pending** (or **Processing/Processed**) page.
2. Enter the **Portfolio Number** (or **Client Name/IC Number**, or **Account Number**) in the search field and click on the **Search** button.
3. Click on a **Portfolio Number** to view its details.

The screenshot displays the FAME 2 Singapore interface. At the top left is the FAME logo with the tagline 'FINANCIAL ACCESS MADE EASY'. At the top right, the user 'John Doe' is logged in, with a last login time of 14 March 2012 at 03:45 PM. Below the header, there are navigation tabs for 'Account Management', 'Transaction', 'Fund Info', and 'Admin'. The 'Transaction' tab is active, and the 'Portfolio Status' sub-tab is selected. The 'Processing' status is highlighted in the 'Transaction Status' section. A table titled 'Processing Portfolios' shows one record:

Portfolio No	Print Out	Account No.	Client	Account Type	Fund source	Advisor	Transaction Date & Time
P12000123	Online	0123210	John Doe	UTWrap	Cash	Elle	09-03-2012 11:42:10 AM

Screen: Processing Portfolio Page

5. View Transaction Details

5.1 Introduction

1. You can view the details of transactions that are pending or processed by PSPL.

5.2 Steps

1. Navigate to **Transaction > Transactions > Transaction Details** page.
2. Select the **Period** of the transactions you want to view. (The default selection is the last 30 days.)
3. Enter the **Account Number** you want to view and click on the **Search** button to display all transactions within the selected period.

Transactions – Transaction Details										
Transaction Details Ledger Others										
Historical data of more than 12 months will be exported in an Excel spreadsheet										
From:		13/02/2012	To:		14/03/2012					
Account Number:		0953143								
Portfolio Number:										<input type="button" value="Search"/>
Transaction Status:		All	Transaction Type:		All					
Fund Manager:		All								
Fund:		All								
Account No:		0123210		Account Type:		UT Wrap				
Client:		John Doe		Fund Source:		Cash				
						1-7	10 records per page		Export to Excel	
Portfolio No.	Order No.	Transaction Date	Settlement Date	Fund Name	Transaction Type	Unit Price	Quantity	Ccd	Amount	
-	-	03-08-2012	-	Piqures Special Fund - SGD	Switch IN	1.02	15000.00	SGD	15300.00	
-	-	03-08-2012	-	Schroder Asian Bond Fund	Switch Out	1.02	4500.00	SGD	4590.00	
-	-	03-08-2012	-	UOB United Asia Pacific Infrastructure Fund	Switch Out	1.02	5250.00	SGD	5355.00	
-	-	03-08-2012	-	UOB United Renminbi Bond Fd SGD	Switch Out	1.02	5250.00	SGD	5355.00	
-	-	03-08-2012	-	Phillip Global Opportunities Fd SGD	Subscription	0.95	3164.22	SGD	3000.00	
-	-	03-08-2012	-	Schroder ISF Glb Corporate Bond Fd A Acc USD	Subscription	8.70	459.77	SGD	4000.00	
-	-	03-08-2012	-	UOB United Global Resources Fund	Subscription	0.99	3045.69	SGD	3000.00	

Screen: Transaction Details Page

6. Update CKA

6.1 Introduction

1. You can update your CKA assessment online.

6.2 Steps

1. Navigate to **Admin > Particulars > CKA** page.
2. Select the **Update CKA** link.
3. Answer all the questions in the popup window and click on the **Submit** button.
4. Your results will be displayed to you immediately.

Customer Knowledge Assessment

Name: [Johnny Wong](#) NRIC/Passport No.: [D001-01](#)

Contact Details: [D001-01 \(H\)](#) [D001-01 \(HP\)](#) (O)

Email: johnnywong@email.com Firm: [Demo Firm A](#)

It is important to find out if you have the knowledge or investment experience to understand the risks and features of unlisted "Specified Investment Products"(SIP) which include unit trusts or similar products. This assessment, known as Customer Knowledge Assessment (CKA), helps to assess your knowledge or investment experience before solution(s) may be offered to you.

Retail clients are required to satisfy the criteria of the assessments before they can proceed/continue to invest in SIPs. For more details please refer to <http://www.mas.gov.sg>

Educational Qualifications

1. Do you have a diploma or higher qualification in any of the following fields? (please select only one)

Please advise the name of the institution that you have received your diploma or higher qualification from:

2. Do you possess any of the below professional finance-related qualifications? (please select only one)
(e.g. AFP/AWP/CFP, AFC/ChFC, ACCA, CLU, CFA/CAIA, CPA/ACCA, CISI, CFTe, FRM, CMFAS M6/M7/MB)

Investment Experience

3. Have you done 6 or more trades in Collective Investment Schemes (CIS) eg. Unit Trust in the past 3 years?
(excluding pure sell, wrap fee liquidation, dividend reinvestment, transfer and regular savings plans)

Yes No

If yes, please state the name(s) of the intermediary(s) where your investment(s) is (are) purchased from:

Screen: CKA Update Page