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I. LOGIN / PASSWORD / SECURITY QUESTIONS

1. When is FAME 3.0 access given to clients?

With effective from 1 Jan 2020, clients under DIY route (i.e purchase Unit trust themselves via POEMS for first trade) will be given FAME 3.0 access within the same week.

FAME 3.0 access is also given to clients who have opened Advisory accounts i.e. Unit Trust Advisory Wrap or Managed Account where Personal Financial Review (PFR) submission is a mandatory requirement.

Clients will receive a set of FAME 3.0 pin mailers containing the Login ID and Password via physical mail. Both pin mailers will contain 9 characters which are randomly generated by the system.

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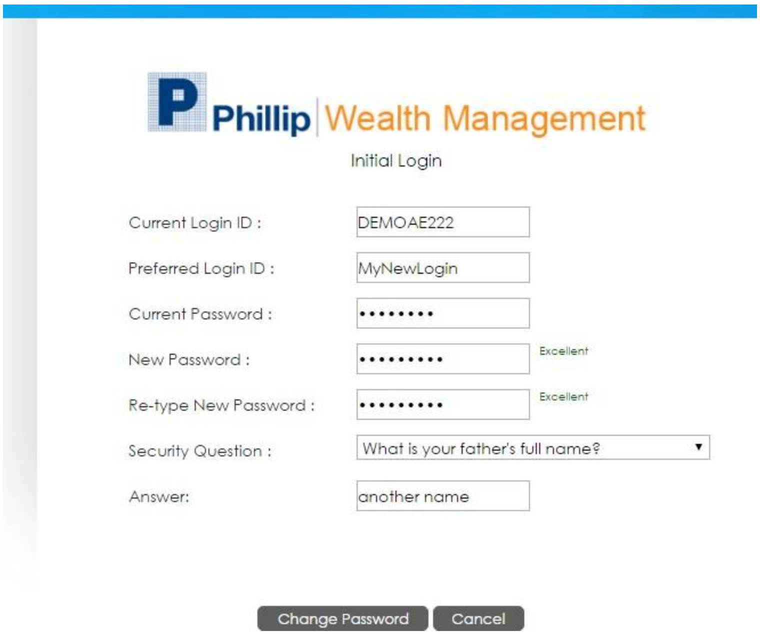
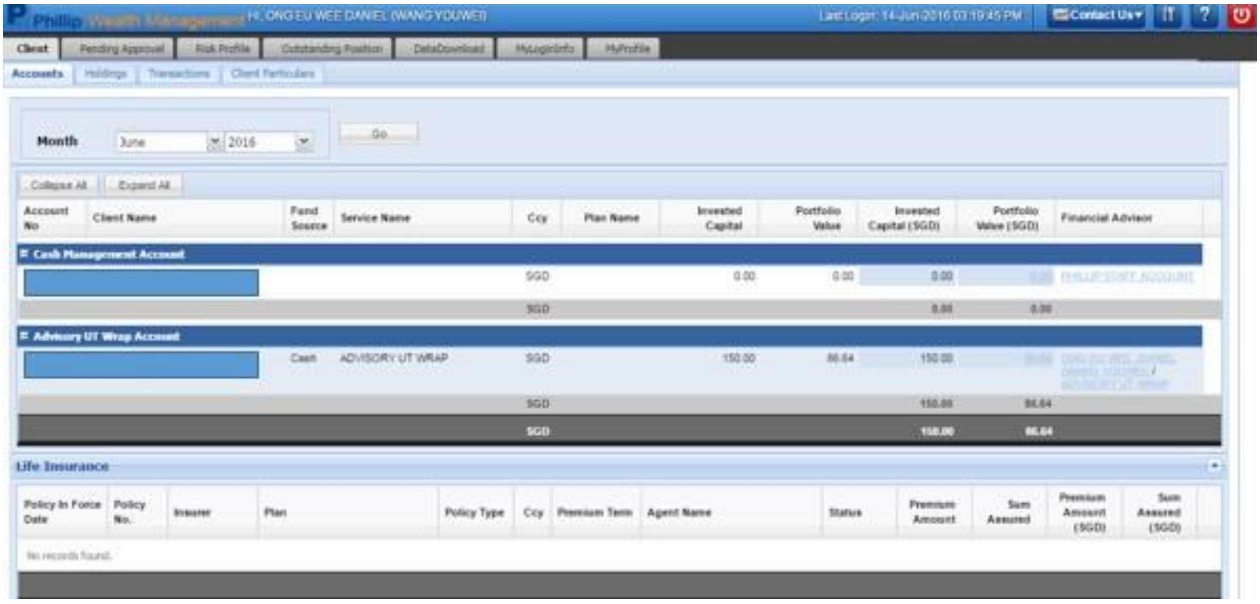
2. How can I login in to FAME 3.0 after I have received the FAME 3.0 Login ID and Password pin mailers?

- Launch Google Chrome browser.
- Type in the website address: https://wm.phillip.com.sg/
- Enter the Login ID and Password as indicated on the pin mailers. At this stage, you would be able to specify your desired Login ID, Password and set up the Security Question and Answer; which will enable the client to perform DIY Password reset in future. After you have changed the Login ID, no further changes can be made in future.



After changing both the Login ID and Password successfully, a notification of successful login ID and password changed will be displayed. You may now log in to Fame 3.0.

Below screen shows the FAME 3.0 modules that you would see upon login.



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3. What if I have forgotten my FAME 3.0 Password, how can I obtain a new Password?

There are several options:

1. DIY online with Security Question-and-Answer. Click the "Forgot Password" hyperlink at the Philip Wealth Management login page to submit request for a new Password online. Enter NRIC for verification, answer the security questions correctly, and a new Password will be emailed to the email address in our records.

2. Call the Customer Experience Unit (CEU) at 65311-555 during office hours. Upon successful verification, a new password will be emailed to the email address in our records.

3. Visit any nearest Phillip Investor Centre (PIC) during office hours with original NRIC or passport to obtain a new password immediately.

4. Download the Password Request form and fax it to (65) 6535-6631 or email to talktophillip@phillip.com.sg. An email for the password will be auto-generated and sent to the email address indicated accordingly in the form. Request forms received after 2pm will only be processed the next working day.

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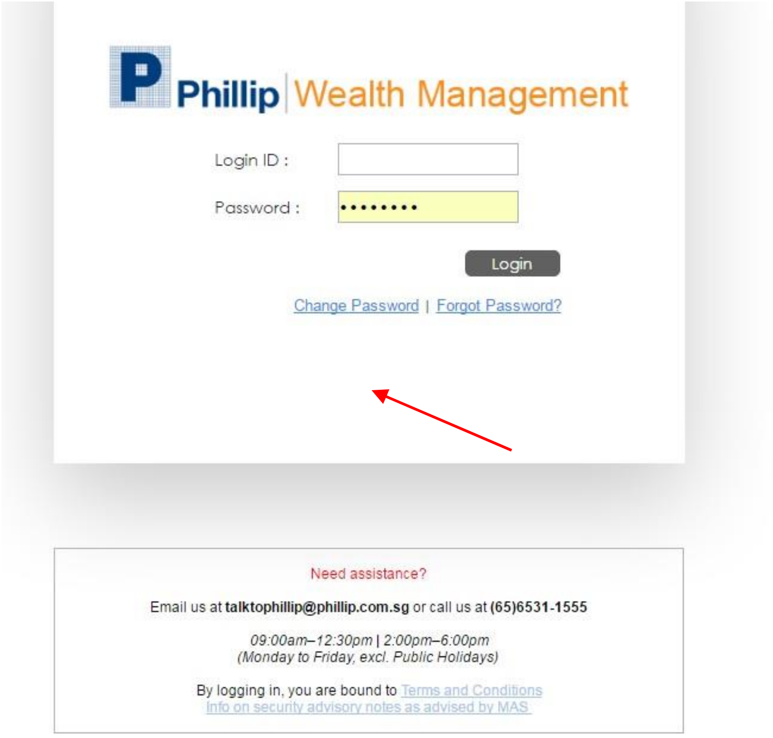
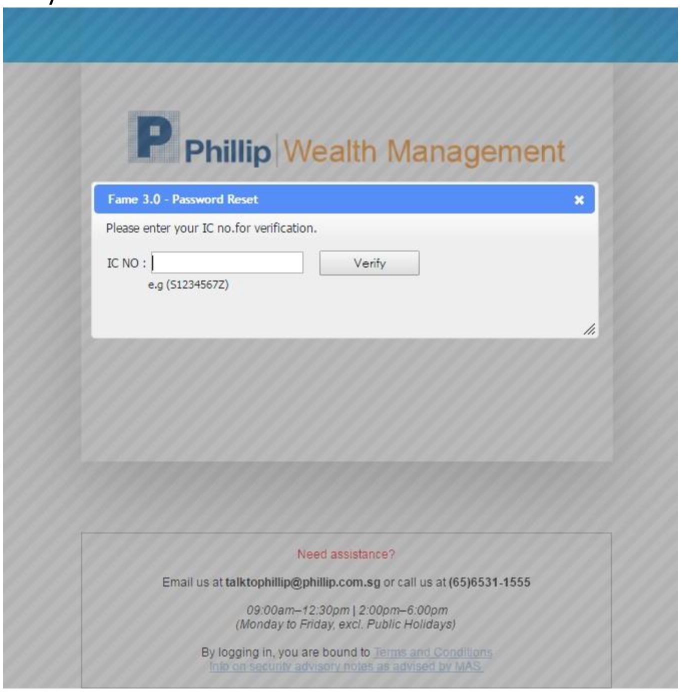
4. How can I reset the FAME 3.0 password myself with the Security Question-and-Answer Online?

Pre-condition: You need to opt in to E-Statement and have already set up the Security Question and Answer before proceeding with below steps:

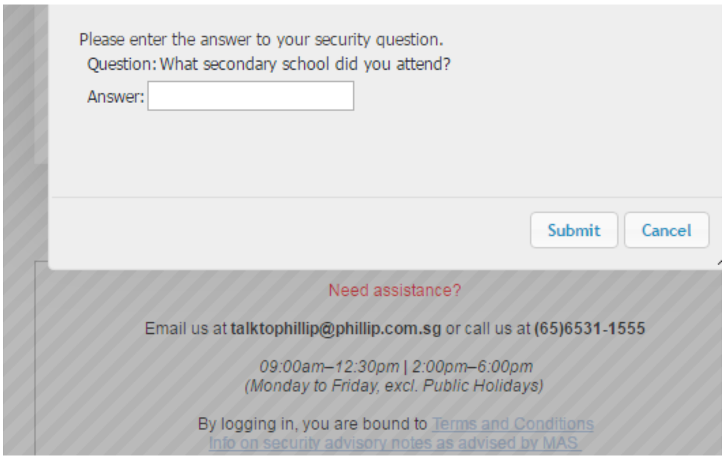
Step 1: Click “Forget Password” on the Phillip Wealth Management login page.



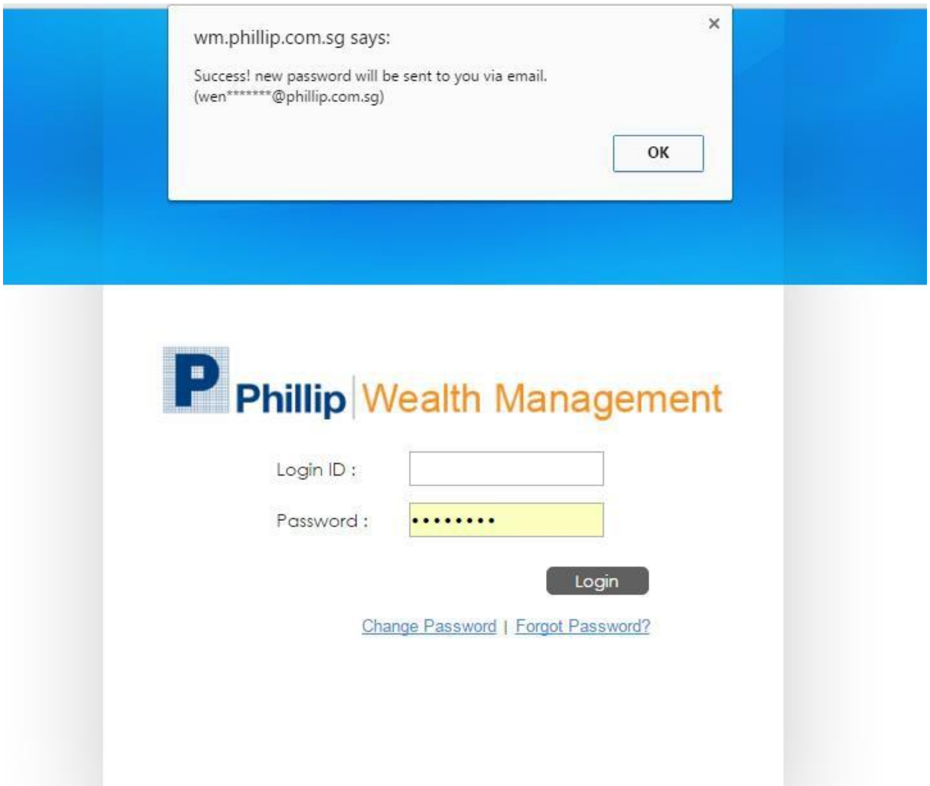
Step 2: Enter your NRIC for verification



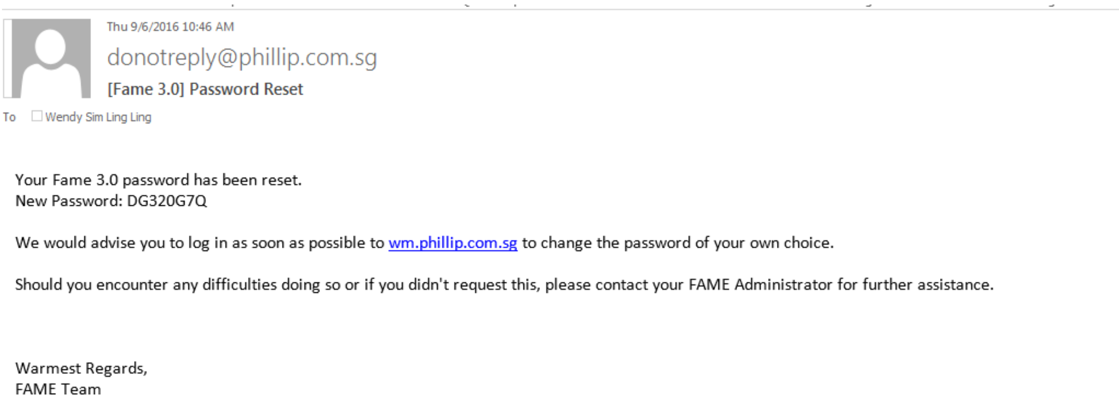
Step 3: Type in the security answer and click "Submit".



A new FAME 3.0 password will be sent to the email in our records.



A sample of FAME 3.0 Password Reset email that you will receive


Thu 9/6/2016 10:46 AM

donotreply@phillip.com.sg

[Fame 3.0] Password Reset

To Wendy Sim Ling Ling

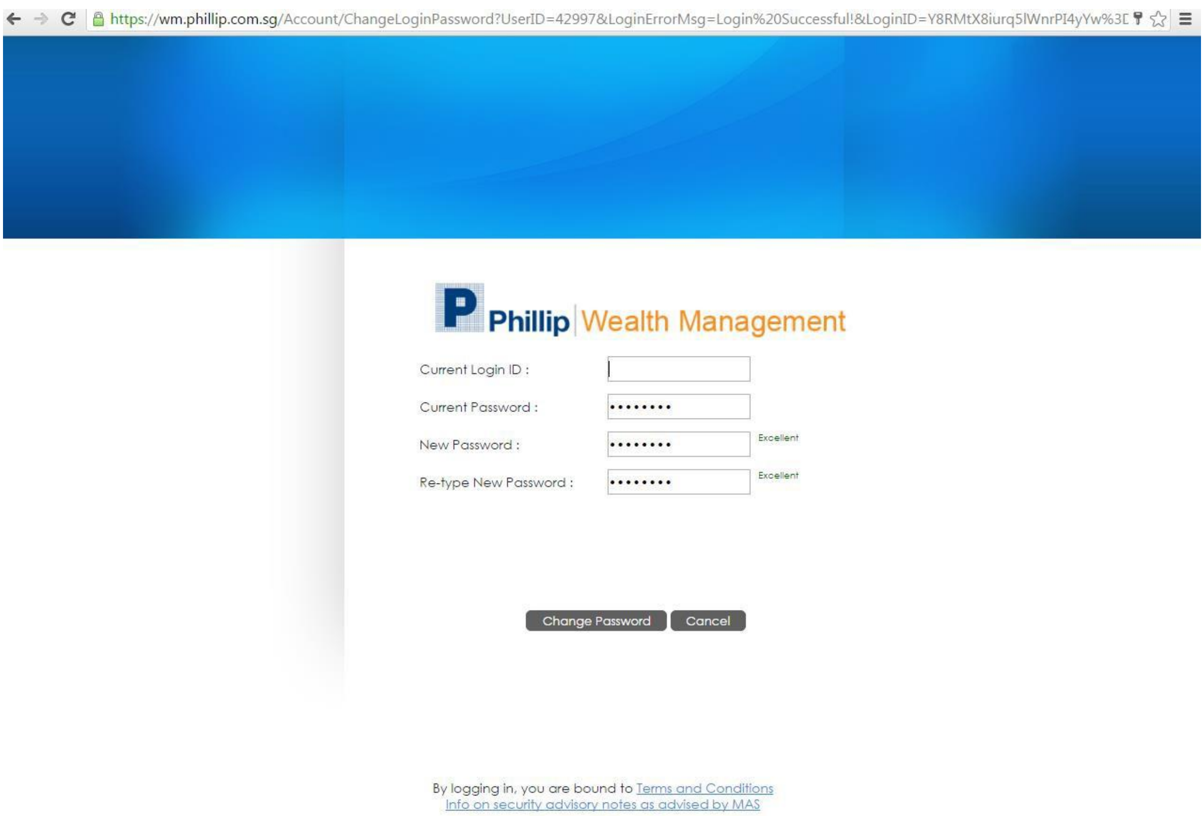
Your Fame 3.0 password has been reset.
New Password: DG320G7Q

We would advise you to log in as soon as possible to wm.phillip.com.sg to change the password of your own choice.

Should you encounter any difficulties doing so or if you didn't request this, please contact your FAME Administrator for further assistance.

Warmest Regards,
FAME Team

Step 4: Go back to FAME 3.0 login page. Enter your Login ID and the newly received password and change to a new Password immediately.



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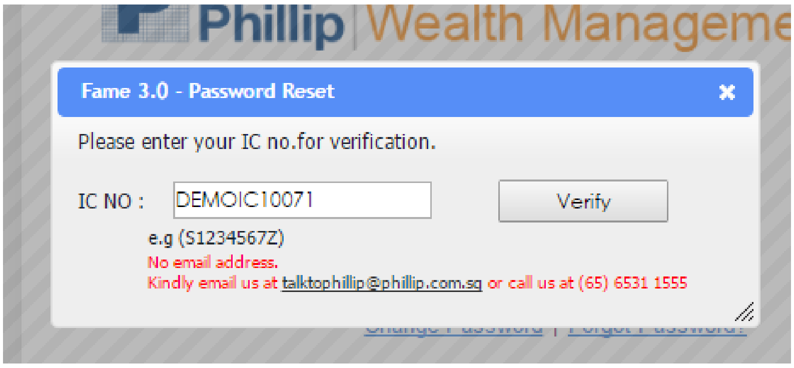
5. I tried to reset my Password using DIY option but encountered an error message. What should I do?

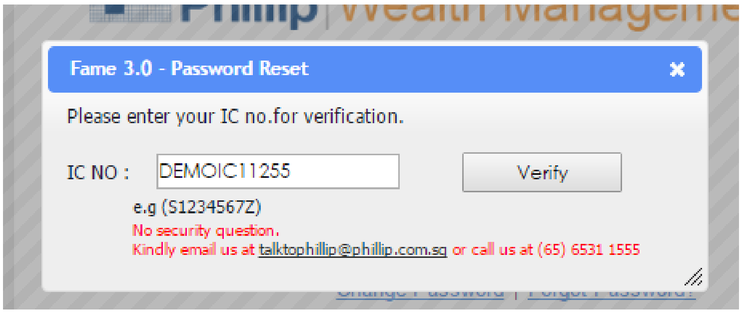
a. <u>No Email Address</u>

Clients are recommended to opt in E-Statement service. In the meantime, refer to Q (6) for the other available options to obtain a new FAME 3.0 Password.



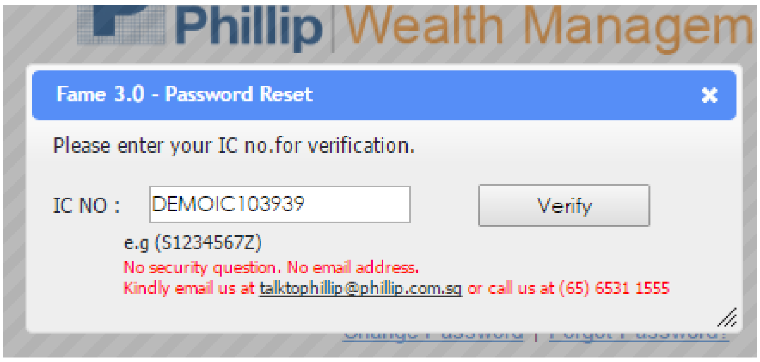
b. <u>No Security Question</u>

Please setup a Security Question and Answer in FAME 3.0 (refer to Q7) after you have managed to reset the password. In the meantime, please refer to Q (6) for the other available options to obtain a new FAME 3.0 Password.



c. <u>No Email Address & No Security Question</u>

Please refer to (a) & (b) above.



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6. I cannot remember my Security Question and/or Answer to perform a DIY online Password reset. How can I request for a new FAME 3.0 password?

You may select any one of the options below:

a. Call Customer Experience Unit (CEU) at 65311-555. Upon successful verification, a new password will be emailed to the email address in our records.

b. Visit any nearest Phillip Investor Centre (PIC) during office hours with original NRIC or passport to obtain a new password immediately.

c. Download the password request form and fax it to (65) 6535-6631 or email to talktophillip@phillip.com.sg. An email for the password will be auto-generated and sent to the email address indicated accordingly in the form. Request forms received after 2pm will only be processed the next working day.

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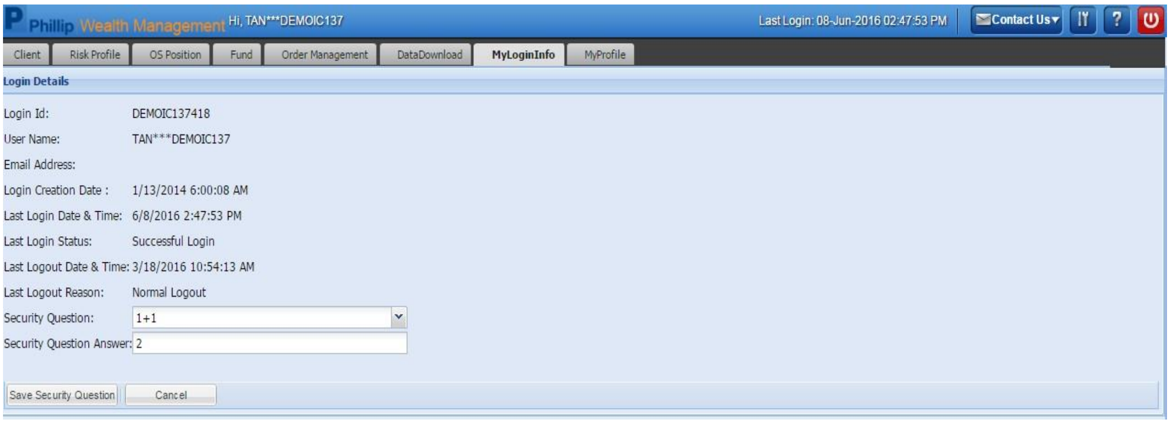
7. Where can I update the Security Question and Answer in FAME 3.0?

Login to FAME 3.0. Navigate to "MyLoginInfo" tab and update or set up Security question and answer.



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8. I have requested for a new password via the Password Request form but have not received it, what should I do?

Please call the Customer Experience Unit at 6531-1555 for further assistance.

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9. Can a joint account holder receive the FAME 3.0 Login ID and Password?

FAME 3.0 Login ID and Password is only issued to the main account holder of the account. There is currently no separate login for the joint account holder.

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II. MISCELLANEOUS

1. How can I update my contact number, mailing and email address?

Please use the Client Particulars form and pass it to your FA rep for submission.

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2. Can I update my personal particulars via FAME 3.0?

This feature is currently not available. Please use the Client Particulars form

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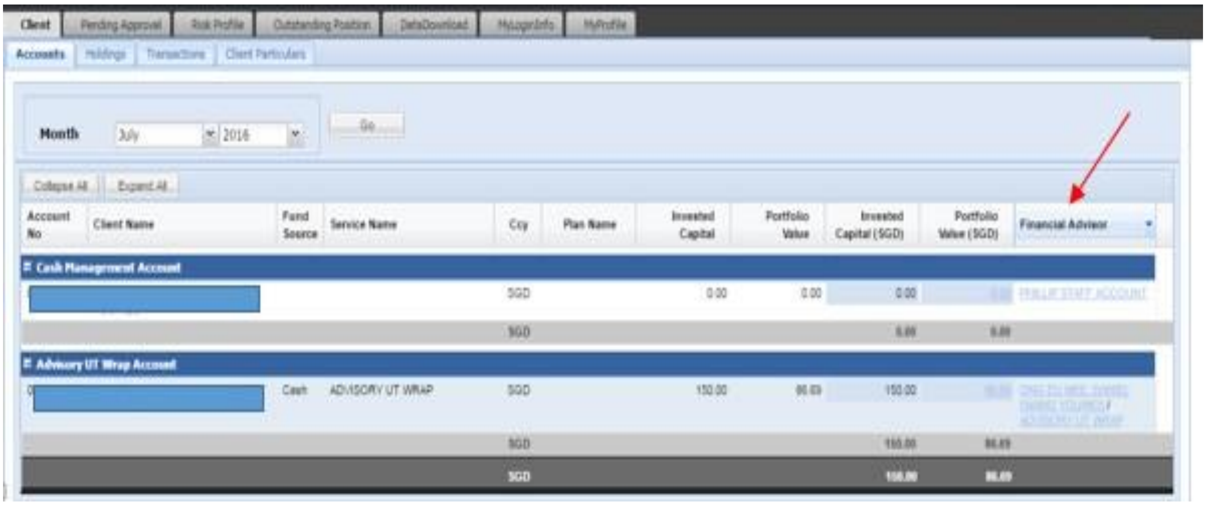
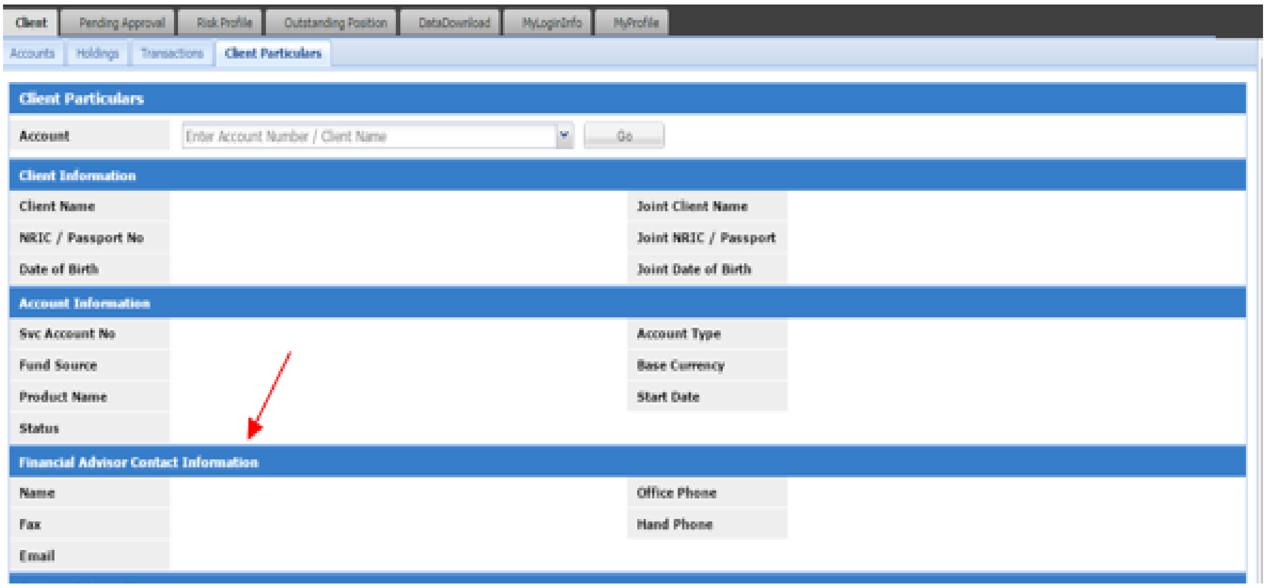
3. Where can I see my Financial Advisory (FA) Representative contact details in FAME 3.0?

Go to Client> Accounts. All accounts are displayed. You can locate your FA Rep by clicking the name that appears at the extreme right column "Financial Advisor".



Alternatively, go to Client > Client Particulars. Enter the account number or name and locate the FA Rep's name under "Financial Advisor Contact Information"



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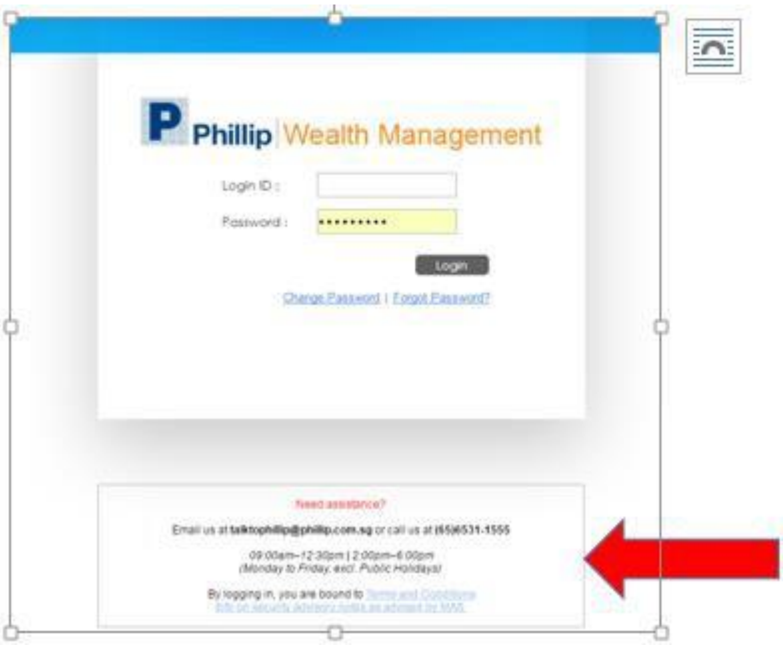
4. If I encounter technical difficulties using FAME 3.0, who should I look for?

Generally, clients should approach their FA as the 1st level of assistance. If your FA is unable to assist, please call our Customer Experience Unit at 6531-1555. Alternatively, you may also write in with details of the issue faced to TalktoPhillip@phillip.com.sg



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5. What web browser should I use to login or approve trades?

Please use Google Chrome only.

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6. How can I opt in to e-Statement in FAME 3.0?

With immediate effect, clients who have Poems / FAME access AND a valid email address will automatically be enrolled into this free e-statement service. Clients are required to do a first time login to FAME system for the activation of this service.

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7. How do I know when the e-Statements are ready?

Email notifications will be sent to your latest updated email address with the company when e-statements are ready.

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8. Do I still need a password to access e-Statements?

No need. After logging in to FAME, clients are able to view and download their e-statements by navigating to the e-statements tab. Contract notes and Monthly Statements are available for a period of 3 months and 12 months respectively from enrolment

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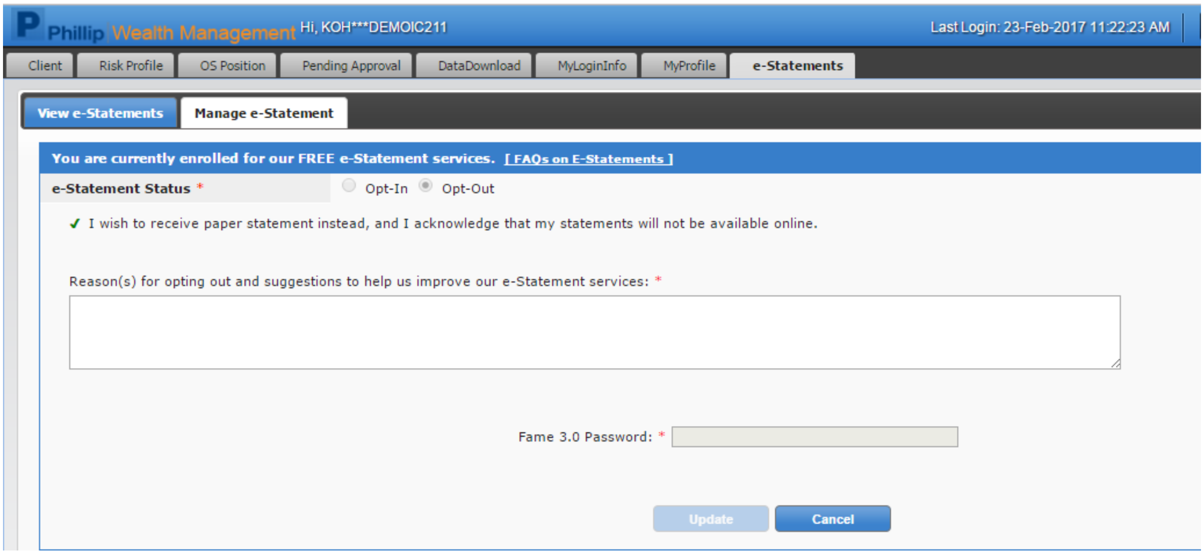
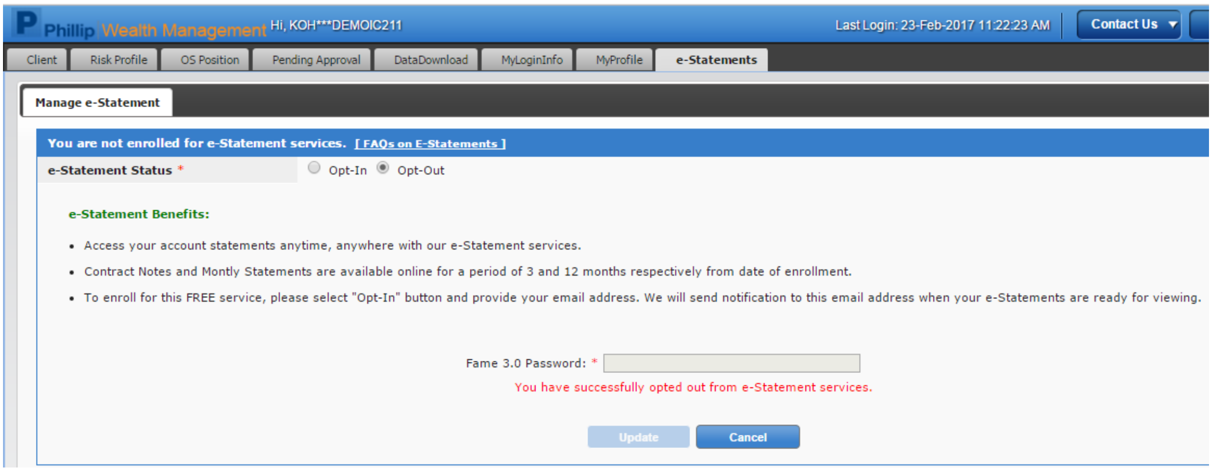
9. I still wish to receive paper statements. How can I opt out of e-Statement?

Step 1: Login to FAME 3.0 and navigate to the e-Statements tab.
Step 2: Click Manage e-Statement and select the Opt-Out radio button
Step 3: Provide reasons for opting out
Step 4: Enter FAME 3.0 password and click Update.





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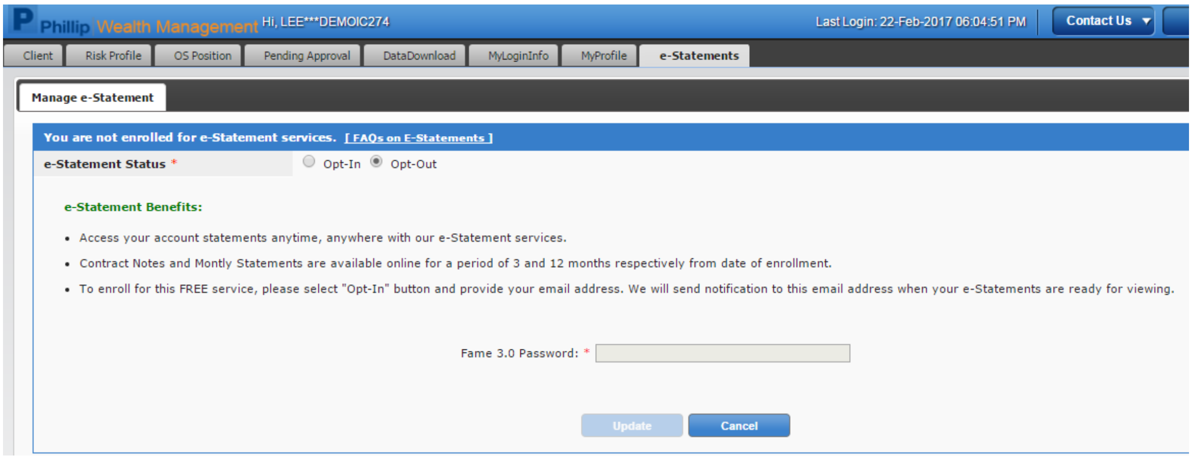
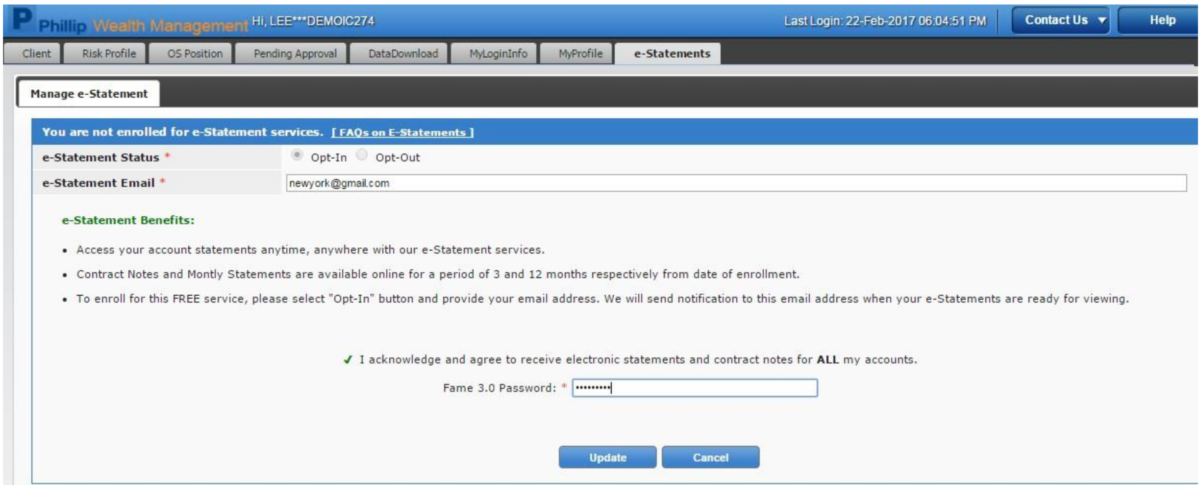
10. How do I opt in to e-Statement again after opting out?

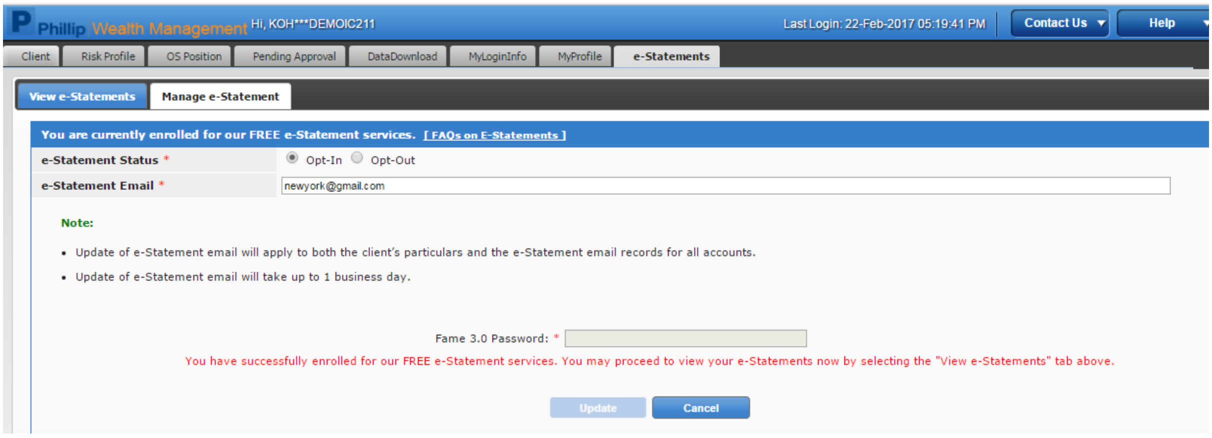
- Click e-Statements on the main tab
- Client will only see “Manage e-Statement” header
- Click Opt-In radio button



- After Opt-In radio button is selected, e-statement email textbox will be displayed and enabled.
- Enter e-statement email
- Enter FAME 3.0 Password
- Click Update



- Upon successful enrolment, client will see a validation message in red text below.
- The “View e-Statements” tab would also be displayed next to “Manage e-Statement”.



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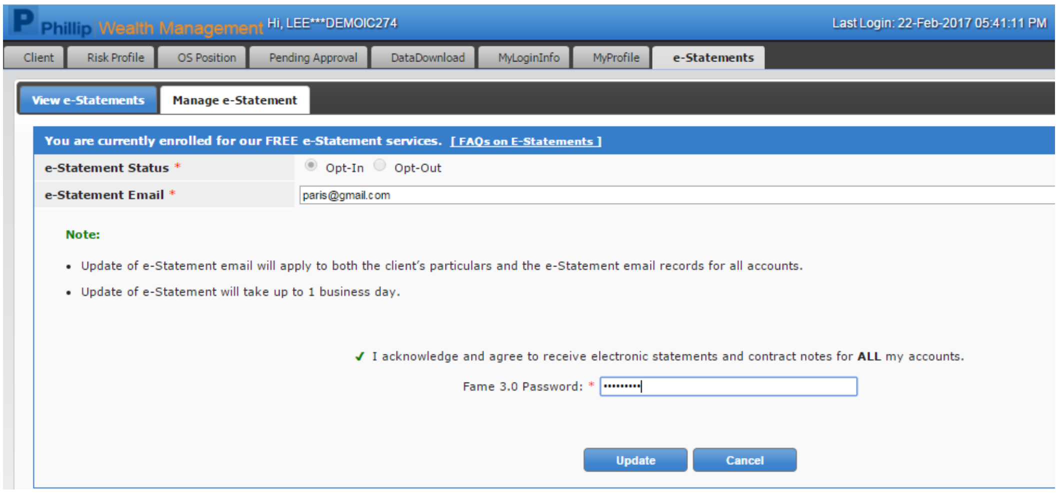
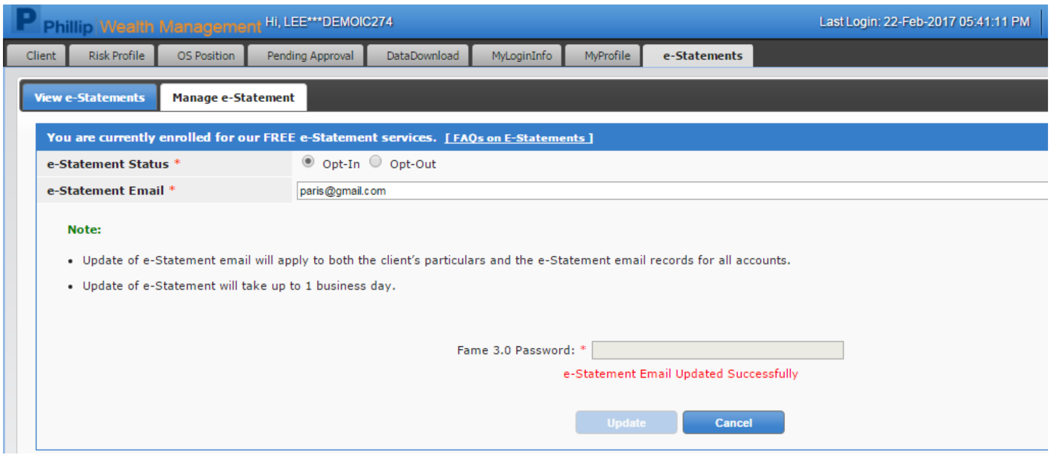
11. How can I update the e-Statement email?

Client can update the e-statement email via the Manage e-Statement tab. The updated e-statement email will apply to all accounts and would take up to one business day to be updated.





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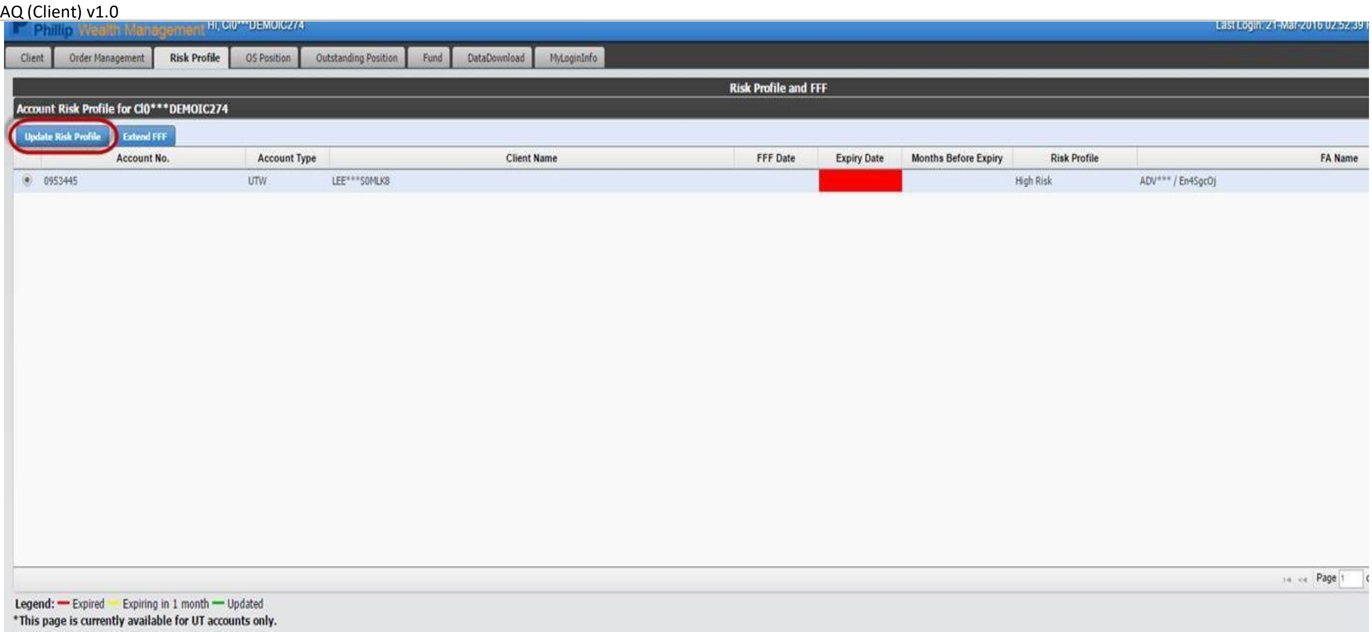
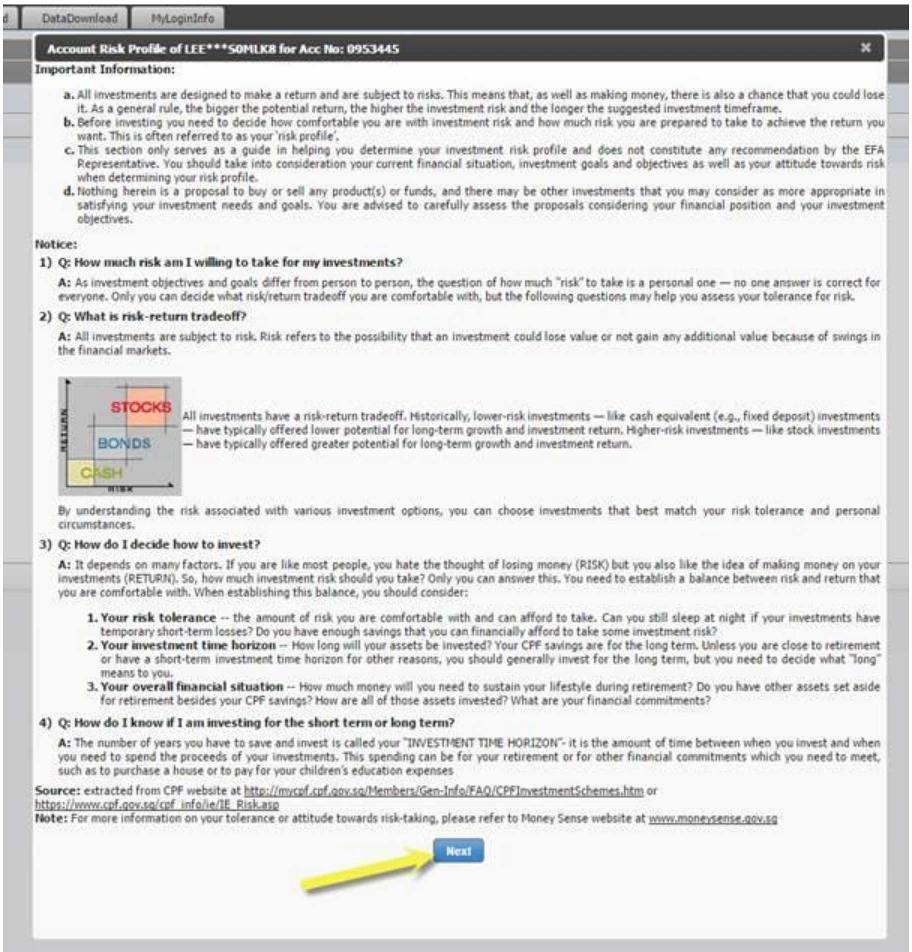
12. How can I update my risk profile in FAME 3.0?

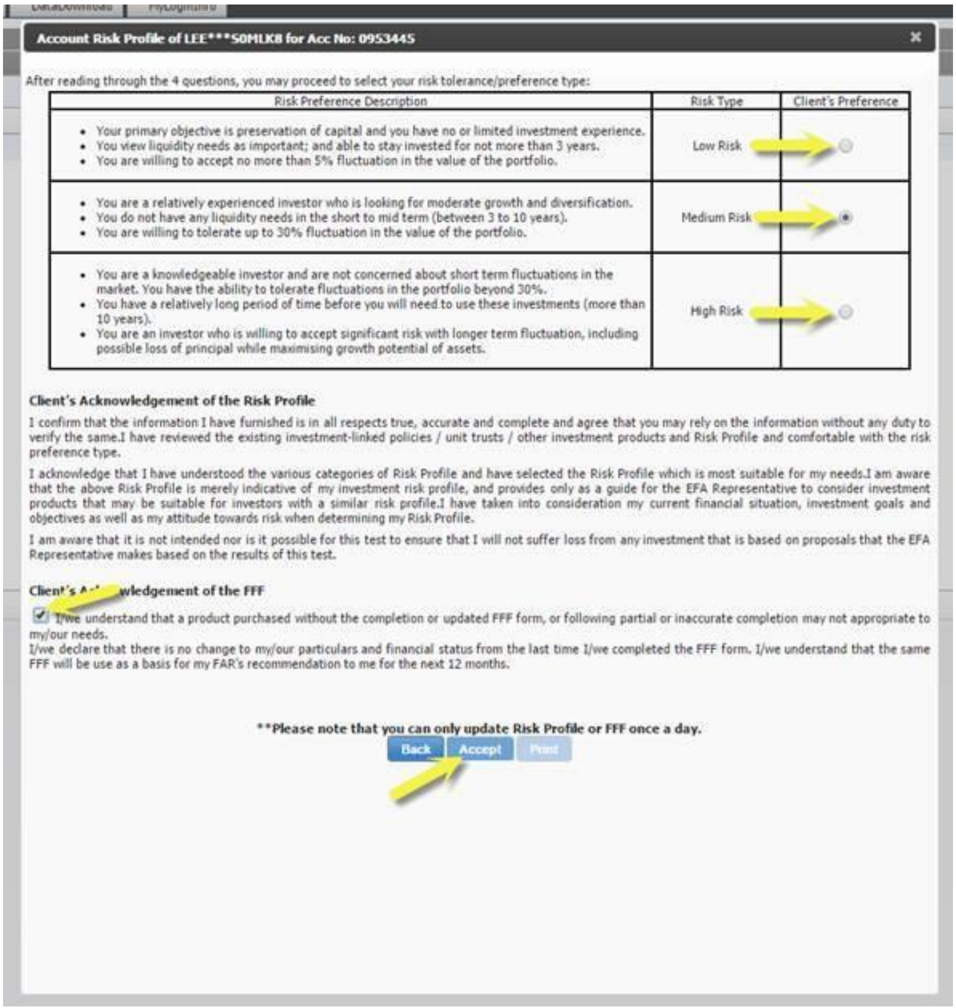
1) Navigate to Fame 3.0 site and login.
2) Navigate to Risk Profile.
3) Select the desired account and click Update Risk Profile button


Phillip Wealth Management
Client
Order Management
Risk Profile
OS Position
Outstanding Position
Fund
DataDownload
MyLoginInfo
Risk Profile and FFF
Account Risk Profile for CI0***DEMOIC274
Update Risk Profile
Extend FFF
Account No.
Account Type
Client Name
FFF Date
Expiry Date
Months Before Expiry
Risk Profile
FA Name
0953445
UTW
High Risk
Legend: Expired Expiring in 1 month Updated
*This page is currently available for UT accounts only.

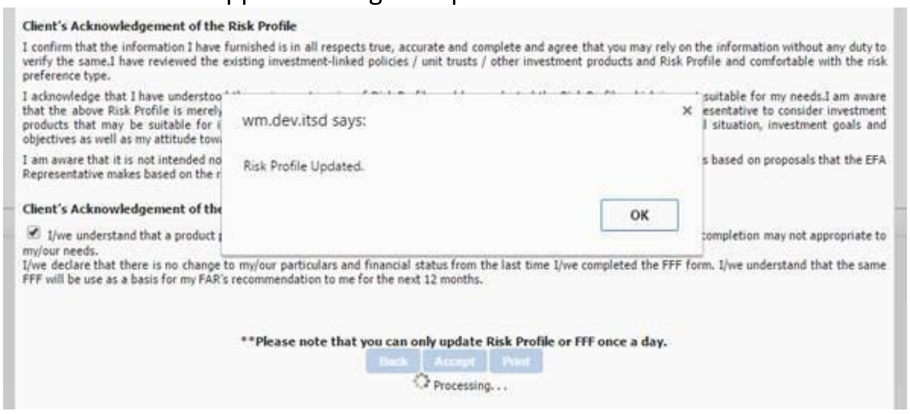
4) Pop up dialog will appear and will display the Risk Profile Important Notes. Click on Next button to proceed.



5) Select the preferred Risk Type, tick the acknowledgement box, and click the Accept button.



6) A notification box will appear stating the update is successful.



7) You may click on the Print button if a printed copy is needed.

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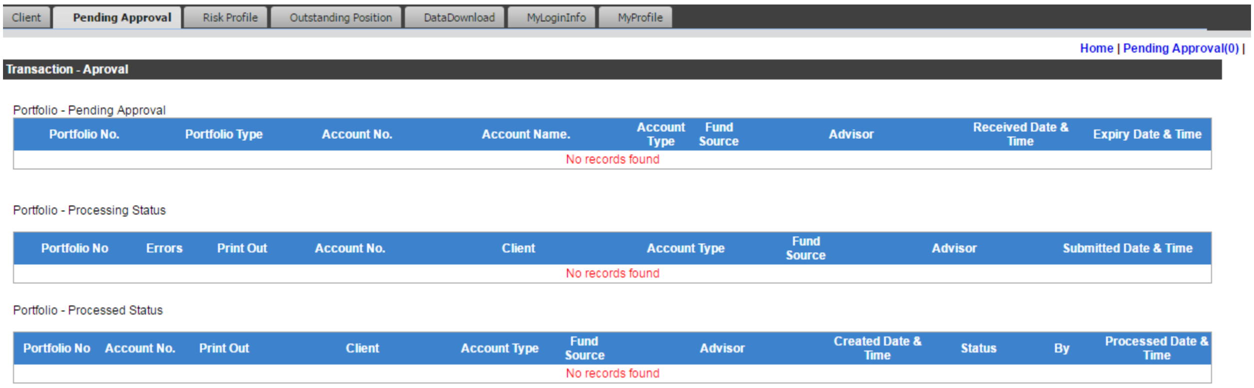
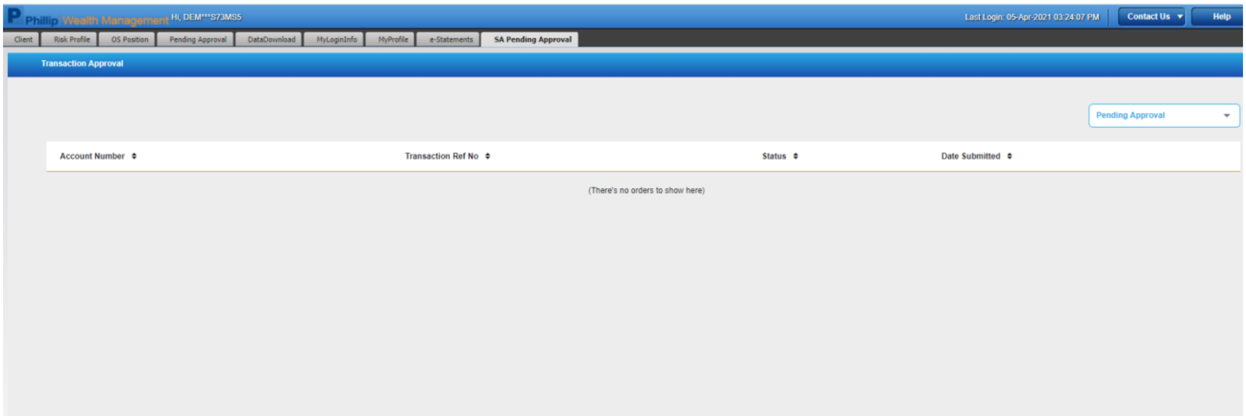
13. Where do I approve pending portfolios submitted by my Financial Advisor to me?

For Unit Trust orders, login to FAME 3.0. Navigate to “Pending Approval”.



For Securities Advisory orders, login to FAME 3.0. Navigate to “SA Pending Approval”. Click on the ‘Transaction Ref No’ to open the portfolio and ‘Submit’ or ‘Reject’ the orders after your review.



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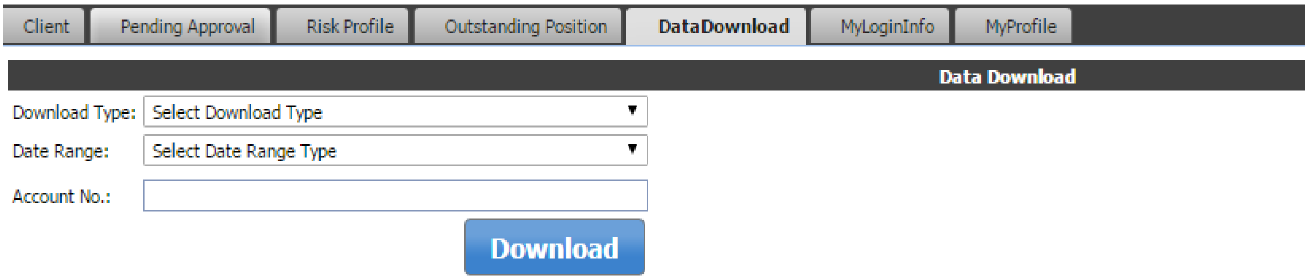
14. Where can I download my past transaction history?

Go to Data Download.
Select Download Type, Date Range and enter the specified account no. An Excel report will be generated.



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