

Getting Started

AMA Mobile App

Are you staying connected and up-to-date with us? For all the latest News, Insights, Direct Access to your Personal Investment Valuations, an array of Financial Calculators and Planners, plus much more, don't forget to download AMA's Mobile App! You can do this by clicking the below link - available from the Apple App Store, Google Play or Android Direct Download - <https://austenmorris.com/mobile-app>

AMA Investor Portal

NB: Please make sure donotreply@onglobalplatform.com and ama_wms@austenmorris.com are added to your SAFE SENDERS/ALLOWED emails and/or contacts so these are received.

You will or have now received and email from ama_wms@austenmorris.com with the subject 'Get Started with your AMA Investor Portal!'.

Upon receipt of this e-mail, please click on this link; <https://login.onglobalplatform.com/AMA262/getstarted> to be redirected to the registration AMA Investor Portal page.


Type in your email address registered with AMA and shown in the e-mail as your 'Username' and then input the CAPTCHA code displayed. This code is *case sensitive*.

Click 'Send email'.

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Associates
Invested Together, Always

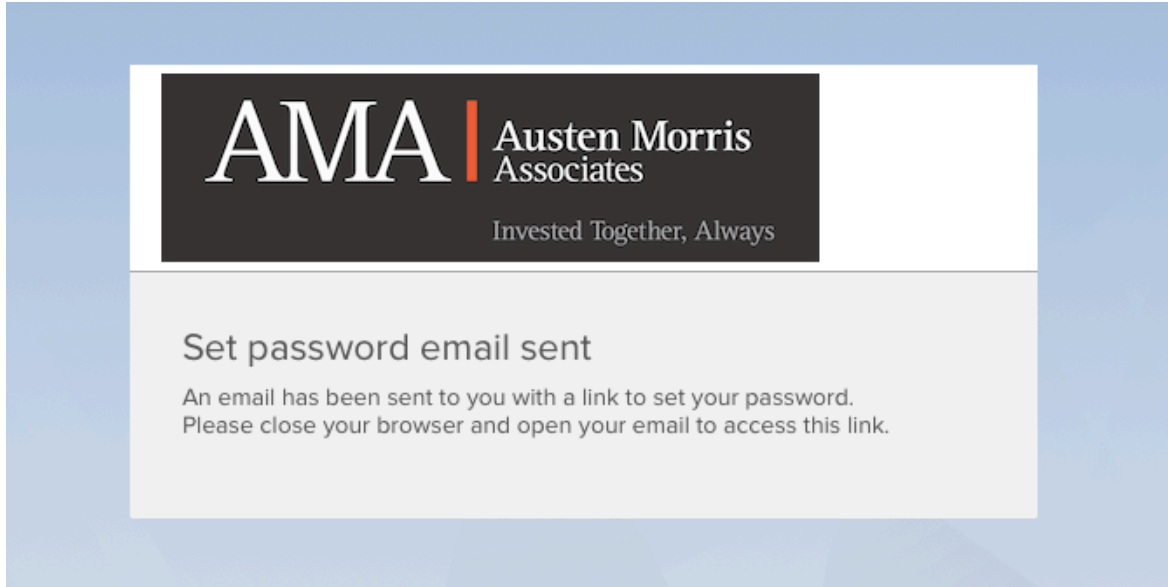
Get started
Already know your password? [Click here.](#)
Or provide your username to set a password.

Username

Enter the code displayed
  Show a new code

An email will be sent to you with a link to set your password.
[Cancel](#)

Set Password email sent to your registered email address.



You should now receive the **User account password set up** email from donotreply@notify.praemium.com. Check your Junk/Spam mailbox for the email in case it lands here.

Click on **Set my password** or copy the link and paste it to your preferred browser.



Set your desired password and click **Submit**.

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Change password

Enter new password

..... ✓

Confirm new password

..... ✓

New password must be:

- At least **8 characters**
- At least **1 number(s)**
- At least **1 capital letter(s)**
- At least **1 special character(s)**

Submit

Cancel

You will be redirected to our AMA Investor Portal to view your investment after submitting your password.

Please visit <https://login.onglobalplatform.com/AMA262/> on any desktop, laptop, mobile or tablet utilising the Username (e-mail address) and Password you have created.

We suggest you save this link to your browser favourites section for easier access every time!

Investor Portal User Guide

The user-friendly and intuitive investor portal enables you to point and click to find what you need. The following guide provides details of the current screens and functionality.

Login

Visit <https://login.onglobalplatform.com/AMA262/> and sign in with your Username and Password that you have created and click 'Log in'.

If you have forgotten your password, please click the 'Forgotten password?' option and follow the prompts.

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Username

austenmorris@austenmorris.com

Password

.....

Forgotten password?

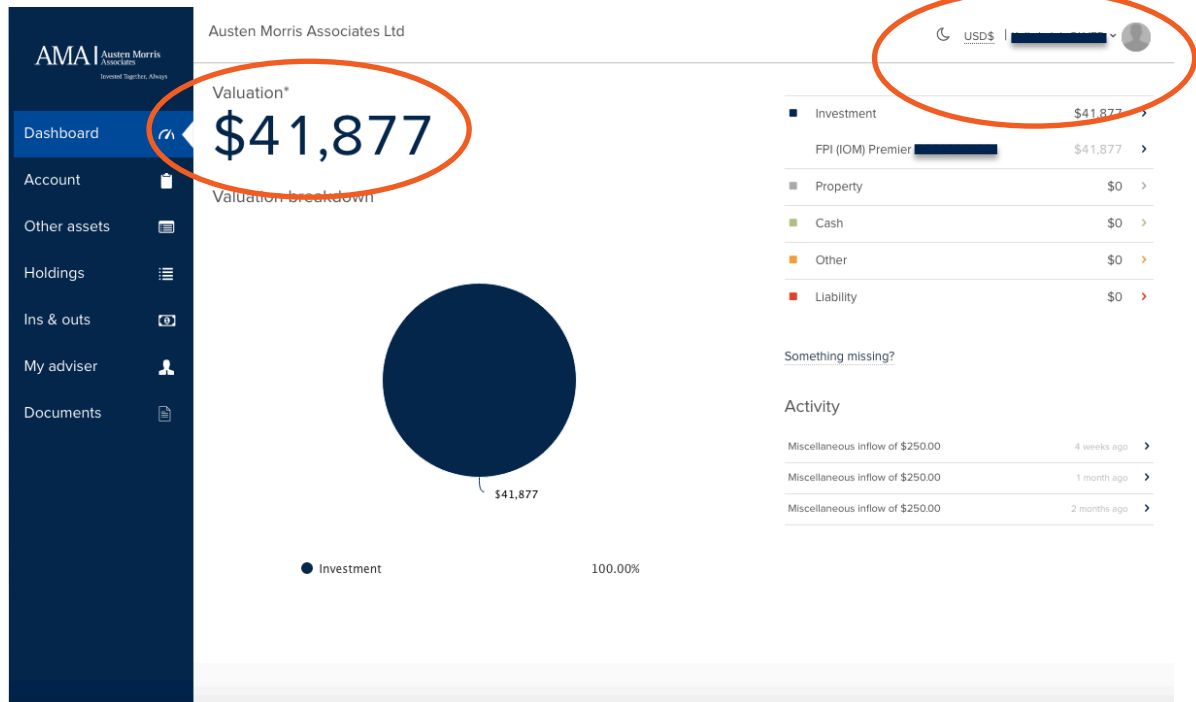
Stay logged in

If you are on a public computer you should not stay logged in

Log in

Dashboard

Your dashboard is the first screen you see when you log on, showing all the accounts that you hold as well as any assets/liabilities you have mentioned when filling a digital Fact Find with your adviser.



Top Right corner allows you to adjust the setting when you click on your name and to choose which accounts you would like to view as well as change the currency and theme colours. You can also refresh, change your password or log out from this area.

If you would like to only view a certain account or exclude personal assets, click on the name and you will have an option to choose.

Activity will show inflows or outflows for the accounts in the last 90 days.

Activity

Miscellaneous inflow of \$250.00	4 weeks ago	>
Miscellaneous inflow of \$250.00	1 month ago	>
Miscellaneous inflow of \$250.00	2 months ago	>

The dropdown menu shows the following options: "Accounts" with checkboxes for "FPI (IOM) Premier" and "Kelly"; "Settings" with a gear icon; "Status" with a refresh icon; "Change password" with a key icon; and "Log off (kellyolver@hotmail.com)".

Account

The Accounts screen provides a summary of the accounts you have selected. Each account is displayed on a card. Each card shows the type of account, provider, product and total market value.

Click on a card to drill further into detail on that particular account.

In this section you will be able to see everything related to that policy. As well as see underlying assets and view pdf factsheets.

The screenshot displays the account details for 'FPI (IOM) Premier' with a total value of \$41,877 as of March 7, 2020. The interface includes a sidebar menu with 'Account' highlighted, a main header with account name and value, and several data points: Net contribution (\$40,100), Change of value % (4.43%), Change of value (\$1,777), Next contribution date (Mar 18, 2020), Regular contribution (\$250), and Commencement date (Jul 18, 2011).

Two charts are present: 'Asset allocation' showing a pie chart with Mixed Asset (90.8%), Commodity/Energy (4.9%), and Equity (4.3%); and 'Valuation history' showing a line graph of value from 2018 to 2020.

Below the charts is a table of assets with columns for Asset, Unit price, Quantity, Value, and Fact sheet. A red box highlights the 'Fact sheet' column, which contains document icons for each asset row.

Asset	Unit price	Quantity	Value	Fact sheet
Equity			\$1,805	
Value Partners High-Dividend Stocks Fund FZ23	\$3.39 6 days ago	532.927	\$1,805	
Mixed Asset			\$38,037	
GAM Star Global Balanced (USD) KJKQ	\$1.14 6 days ago	13,873.075	\$15,760	
GAM Star Global Cautious (USD) KJKN	\$1.10 6 days ago	2,476.729	\$2,732	
GAM Star Global Growth (USD) KJKT	\$1.18 6 days ago	16,536.221	\$19,546	
Commodity/Energy			\$2,034	
BlackRock GF World Gold FX27	\$1.25 6 days ago	1,631.458	\$2,034	

Other Assets

It includes all of the information you have provided in your digital Fact Find such as Assets, Liabilities, Income or Expenses.

Austen Morris Associates Ltd

USD\$ [User Profile]

\$380,000 Property

Kelly [User Profile]

Property

Asset	Value	Date
Croatia	\$500,000.00	Jan 22, 2020

Liability

Liability	Value	Date
Croatia Mortgage	-\$120,000.00	Jan 22, 2020

To view assets within accounts click here

Holdings

Clicking on Holdings in the menu on the left-hand side of the screen, brings you to the detailed list of holdings in your accounts.

The total figures at the top of this page show, for the accounts you have selected, the:

- Valuation – the total value of assets
- Date – the date of the valuation data

The top menu also provides a search function where you can search for an asset by name or ISIN.

Austen Morris Associates Ltd

USD\$ [User Profile]

Valuation Date

\$421,877

Search...

Asset	Category	Unit price	Value
Equity \$1,805			
Value Partners High-Dividend Stocks Fund FZ23	Investment	\$3.39 6 days ago	\$1,805
Mixed Asset \$38,037			
GAM Star Global Balanced (USD) KJKG	Investment	\$1.14 6 days ago	\$15,760
GAM Star Global Cautious (USD) KJKN	Investment	\$1.10 6 days ago	\$2,732
GAM Star Global Growth (USD) KJKT	Investment	\$1.18 6 days ago	\$19,546
Commodity/Energy \$2,034			
BlackRock GF World Gold FX27	Investment	\$1.25 6 days ago	\$2,034
Property \$500,000			
Croatia	Property		\$500,000
Liability -\$120,000			
Croatia Mortgage	Liability		-\$120,000

Columns display

The small cog to the right of the table header allows you to see more or fewer columns in the display. The viewable columns are:

- Category – indicates which account type the asset belongs to
- Unit Price – the latest available market price for the asset
- Quantity – the number of shares, units or nominal held in that asset
- Cost – the average cost price for the asset
- Value – the latest market value for the asset (quantity x unit price)
- Gain/Loss – the amount of gain or loss on the asset, the difference between the cost and value
- Gain/Loss% - the percentage gain or loss based on the gain/loss divided by the cost

You can group your assets according to:

- Asset class – e.g. equities, bonds, cash
- Category – by account type
- None – all together in alphabetical order

The screenshot shows the 'Holdings' page for Austen Morris Associates Ltd. The total valuation is \$421,877. A table lists assets such as 'Value Partners High-Dividend Stocks Fund' and 'GAM Star Global Balanced (USD)'. A 'Display settings' menu is open, showing options for columns and grouping. The 'Group by' option is highlighted with a red circle, and the 'Display settings' menu is also circled in red.

Ins & Outs

In this section you will see all the in/outflows from your account(s). You can choose if you want to display it for all accounts or a specific policy.

Alternatively, you can click on **“Show all transactions”** to view it in the list format.

The screenshot shows the 'Ins & Outs' page for Austen Morris Associates Ltd. It features a bar chart showing monthly flows from October 2019 to March 2020. The chart includes categories for Additions, Income, Expenses, and Withdrawals. A dropdown menu is set to 'Displaying all accounts'. A 'Show all transactions' button is highlighted with a red box at the bottom of the page.

The last two sections are **My adviser** where you can find all of the contact details and **Documents** where the financial consultant can upload files for you to view.

The screenshot displays the client portal interface for Austen Morris Associates Ltd. On the left is a dark blue navigation sidebar with the following menu items: Dashboard, Account, Other assets, Holdings, Ins & outs, My adviser (highlighted with a red box), and Documents. The main content area is titled 'My adviser's details' and features a profile card for Kelly Olver. The card includes a circular profile picture, the name 'Kelly Olver', an email address 'kelly.o@austenmorris.com', and two phone numbers: '+86 21 6060 1486' and '+86 159 2151 5711'. A 'share' icon is located in the top right corner of the profile card.