Document Centre User Guide – Customer Knowledge Assessment in Online Banking

To get to Document Centre, first login with your Security Device.

Click on “Wealth Dashboard / Securities Trading” on the lefthand column.

Next, click on “Launch Wealth Dashboard”.

Next, click on “Document Centre” on the top header, where you will be directed to the Document Centre homepage.

Here you can find document expiry dates and statuses, which can be updated at any time.

Do note the date of your last update made to your Customer Knowledge Assessment.

After clicking “Update” , you can adjust your answers accordingly and ensure your information is up-to-date.

When ready, click “Continue and Update”, and your new result will be reflected accordingly.

To return to Document Centre, click “Back to Document Centre”.

Bear in mind that there are different expiry dates for Customer Knowledge Assessment and Customer Account Review.

The results reflected here are the most updated ones.

The Risk Warning Statement will be made available for download in a new window.

Do remember to gather all your signed forms.

Once all updates through Document Centre are done, you will receive a confirmation.

All your changes have been securely stored in our system.