

Document Centre User Guide: Risk Profiling Questionnaire 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.

Upon clicking on “Update”, you will see your current Risk Profiling Questionnaire result.

If a Risk Profiling Questionnaire was never done before, you will see an introduction of the Risk Profiling Questionnaire.

Click “Continue to Questionnaire” and proceed to complete the form.

The online Risk Profiling Questionnaire is the same as the offline version.

This online questionnaire would have captured the answers you have entered previously.

To update your answers, simply select a new one and click “Get Result”.

A new result will be reflected.

You can also choose to lower the assessed risk tolerance.

In the event that a higher risk tolerance is chosen, there will be a pop-up window asking for more details.

Enter the reason and click “Confirm”.

The status of your Risk Profile Questionnaire will now be valid for 1 year.