

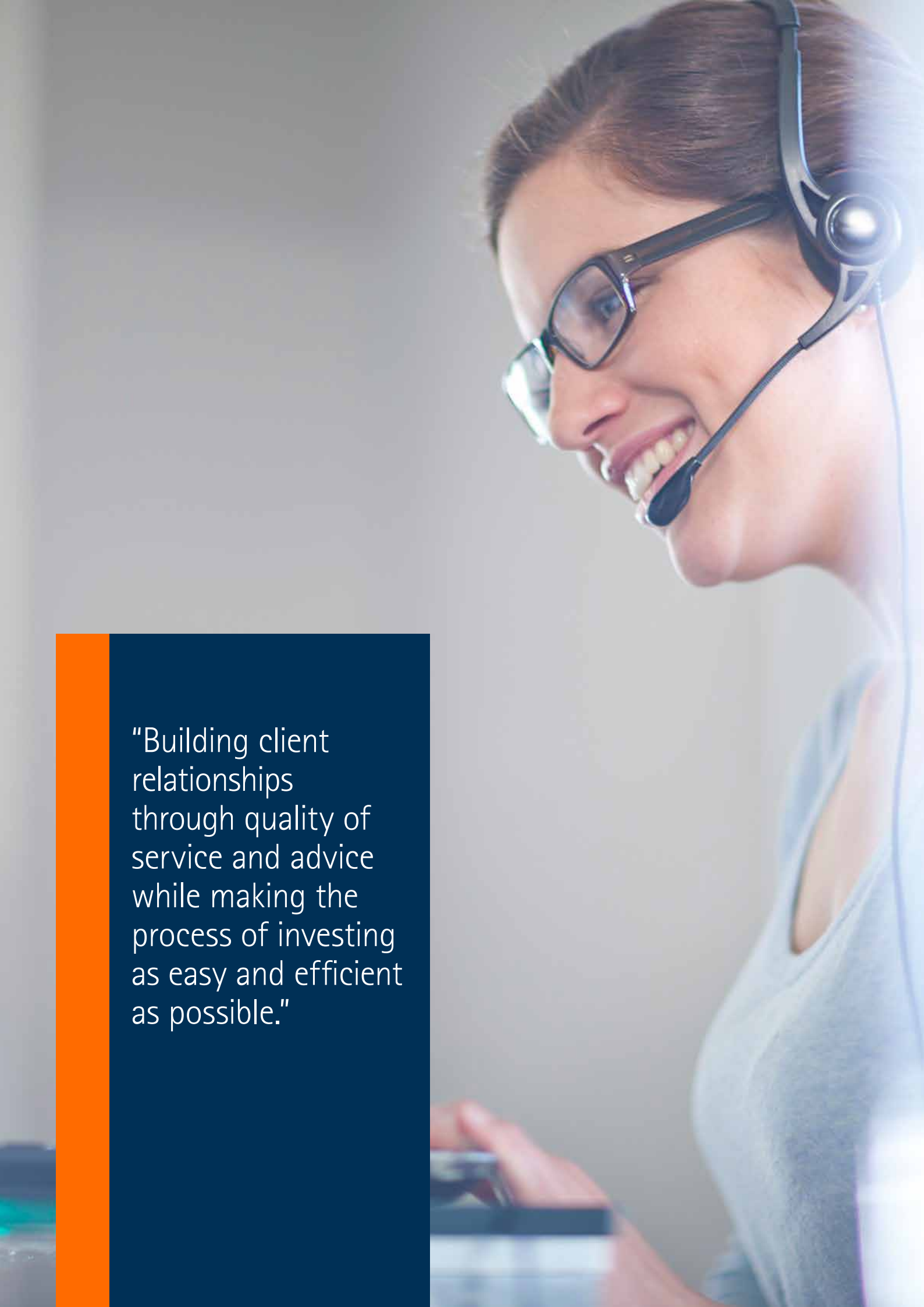
AMA | Austen Morris  
Associates

Invested Together, Always

AMA Client | Online Account User Guide

[www.austenmorris.com/login](http://www.austenmorris.com/login)



A woman with brown hair, wearing glasses and a headset with a microphone, is smiling and looking down at a device in her hand. The background is a plain, light-colored wall.

"Building client relationships through quality of service and advice while making the process of investing as easy and efficient as possible."

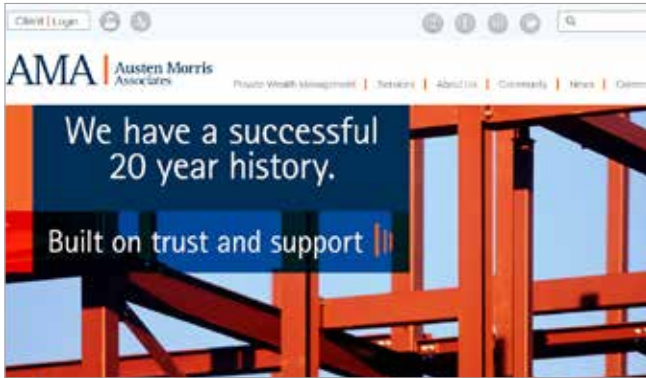
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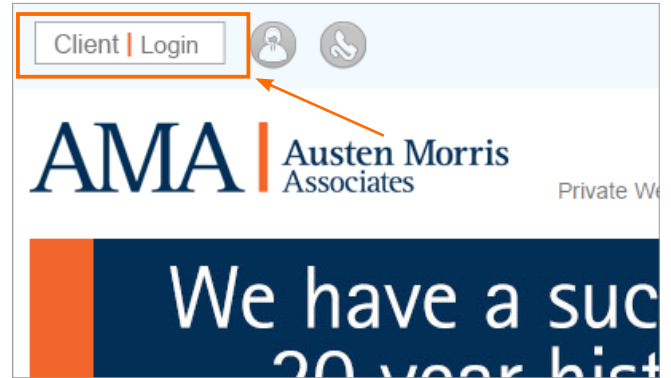
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## | Login and set up your account in 5 steps:

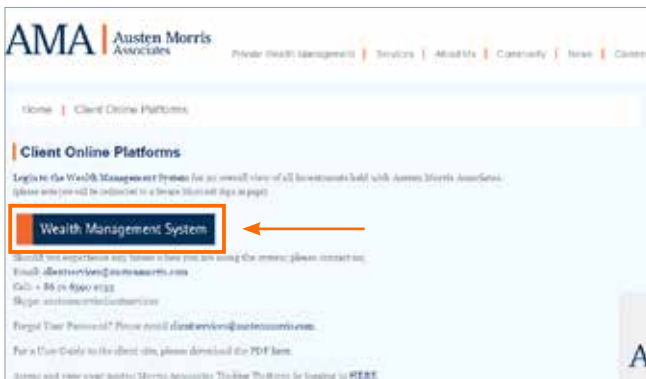
1 | Visit 'www.austenmorris.com/login'



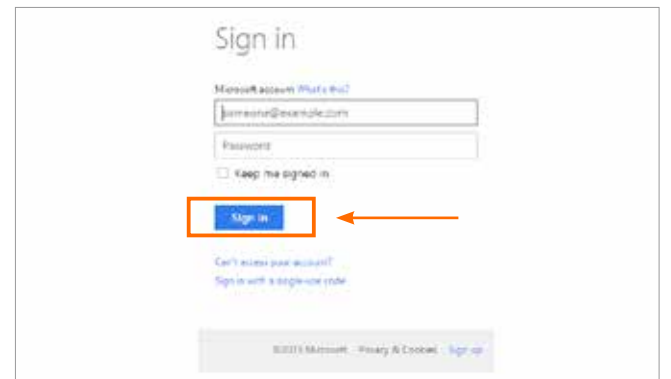
2 | Go to: 'Client | Login' on the top left



3 | Choose the 'Wealth Management System' (You will be redirected to a Windows Live Login page)



4 | Sign in with your username and password provided by Client Services



5 | Click on 'Agree'



## Client Profile



In order to update and/or keep your contact information relevant, please choose 'Client Profile' (1).

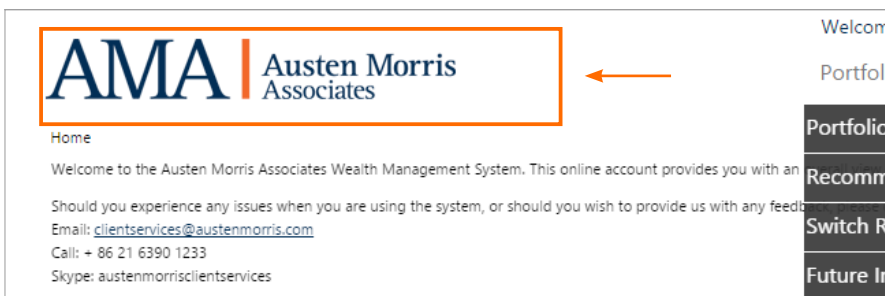
(Or click on 'Close' next time and/or once you have modified your information (2).)



To modify your contact information choose 'Modify My Profile' (3).



Once complete choose 'Save'.



Click on the AMA logo to view your dashboard.

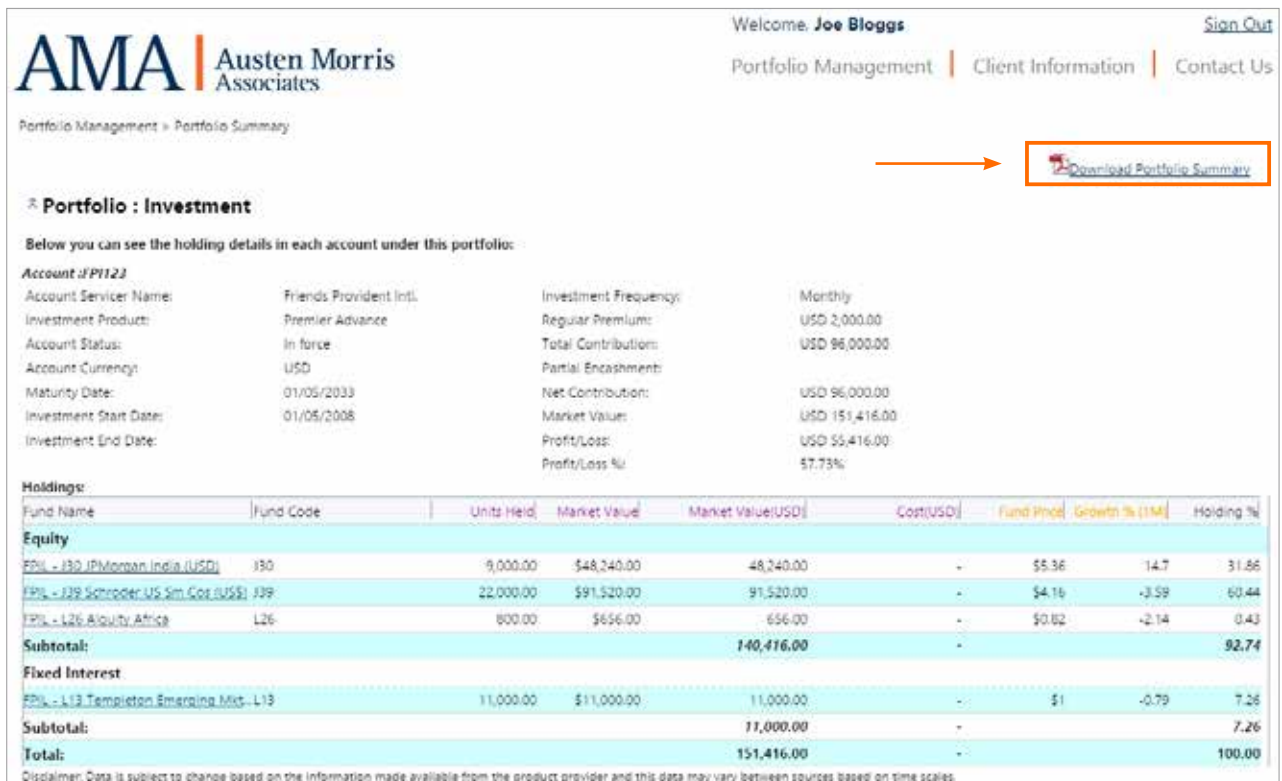
# Portfolio Summary

## How to view and download your portfolio valuation

Our Portfolio Summary is a snapshot of your investments. In order to view these, and to download a valuation in PDF format, click / choose this option via the Portfolio Management drop down menu.



Click 'Portfolio Management' and 'Portfolio Summary' and 'Download Portfolio Summary'



## | Accepting Online Recommendations

If you are a Wealth Management Service subscribed client, you will receive Online Recommendations to your AMA account on a quarterly basis. Once you receive a notification that a recommendation is available for your review and action, you can view this in the Recommendations section as follows:

The screenshot shows the client portal dashboard for Joe Bloggs. The navigation menu includes 'Portfolio Management', 'Client Information', and 'Contact Us'. A dropdown menu is open, highlighting 'Recommendations' with an orange box and an arrow. Other menu items include 'Portfolio Summary', 'Switch Request', and 'Future Investment Allocation'. Below the navigation, there are two pie charts: 'Asset Allocation' (Equity: 74.74%, Fixed Interest: 4.36%, Commodity/Energy: 20.90%) and 'Plan Allocation' (Premier Advance (FPI123): 51.64%, Vision (GEN456): 48.36%).

'View Details' of your recommendations.

The screenshot shows the 'Recommendations' section of the client portal. It displays a table with the following data:

	Account Number	Account Servicer Name	Status	No Change	Advisor	Modified On	
<a href="#">View Details</a>	FPI123	Friends Provident Intl.	Accepted	Yes	WMS Admin	17/07/2013	
<a href="#">View Details</a>	FPI123	Friends Provident Intl.	Accepted	No	WMS Admin	28/01/2013	
<a href="#">View Details</a>	FPI123	Friends Provident Intl.	Declined	No	WMS Admin	05/12/2012	
<a href="#">View Details</a>	GEN456	Generall International	Declined	No	WMS Admin	30/11/2012	
<a href="#">View Details</a>	FPI123	Friends Provident Intl.	Accepted	No	WMS Admin	22/11/2012	
<a href="#">View Details</a>	GEN456	Generall International	Declined	No	WMS Admin	19/09/2012	

**NB:** For those recommendations that require your action the status will be denoted as 'Pending Review by Client'. For those recommendations already actioned (either Accepted or Declined) the status will show accordingly.

Click 'Accept' or 'Contact your Consultant'.

FFA - 777 Portfolio US Int'l S&P 500	777	24,000.00	33.67	12/07/2013	285,740.00	63.16	0
FFA - 867 Tempestad Emerg Mktg	863		\$1.40	15/07/2013			30.00
FFA - 129 Fidelity Strategic Growth US	L29		\$0.67	12/07/2013			10.00
FFA - 802 Vanguard US 500 Stock	P02		\$1.18	15/07/2013			30.00
FFA - 847 Investec US Gov Energy	P47		\$1.61	15/07/2013			15.00
<b>Total:</b>					<b>\$127,816.00</b>		

Disclaimer: Data is subject to change based on the information made available from the product provider and the data may vary between sources based on time scale.  
Asset allocation following the recommendation, compare to the model asset allocation based on your risk profile which is Growth:

**Asset Allocation (Recommended)**

**Model Asset Allocation**

**Advisor Comments:**  
Dear Client,  
Due to recently meeting and market conditions, we don't recommend any portfolio changes at this time.  
Modified By: Admin  
WealthCraft

I have received and understand the consultant's recommendation for my portfolio review. I have filed out a risk analysis at my last review and I'm ideally suited for Growth portfolio.  I accept

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To learn more about our enhanced online services and receiving online recommendations if you're not a Wealth Management Service subscribed client, please contact your Consultant or our Client Services team on [clientservices@austenmorris.com](mailto:clientservices@austenmorris.com) who will be happy to help.

## Assistance and Queries

Find the contact of your Consultant.

**AMA** | Austen Morris Associates

Welcome, **Joe Bloggs**

[Sign Out](#)

Portfolio Management

Client Information

**Contact Us**

Contact Us > Your Consultant

Consultant: AMA Admin  
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Fax: +86 21 63901235

Your Consultant

Client Services