Julius Bär

E-BANKING USER GUIDE

www.juliusbaer.com/ebanking-asia

INTRODUCTION

WELCOME TO JULIUS BAER E-BANKING

With a fresh design and various personalisation options, Julius Baer e-Banking gives you convenient and secure access to your financial information any time, anywhere.

This user guide describes the main functionalities of the platform and helps you get started.

Should you have any questions regarding Julius Baer e-Banking or need assistance to use the service, we are here to help. Simply call our dedicated team of customer service professionals – they will be happy to be of assistance.

E-CHANNELS SERVICE CENTRE

Opening hours:
Monday to Friday, 9 am to 6 pm (SGT/HKT)

Telephone number:
+852 2869 30 38 (HK)
+65 6739 38 38 (SG)

MAIN FUNCTIONALITIES

Julius Baer e-Banking offers a comprehensive range of services to make your online banking experience easy and enjoyable.

- **Dashboard:** Get a customisable snapshot of your financial information of all portfolios associated with your e-Banking access, including easy access to notifications and favourites.
- **Assets:** View and analyse your account and portfolio information.
- **Orders:** Look at your trading history including pending orders.
- **Research:** Access research information.
- **Services:** Send secure messages to your relationship manager or the Service Centre, view and download bank documents, and set up Alerts and Notifications.
- **Mobile Banking** with the Julius Baer Mobile App.

e-Banking is a secure, user friendly and reliable tool to retrieve accurate information 24/7.

Functionalities mentioned in this publication may not be available in all countries and for all means of access.

CONTENT

LOGIN ON DESKTOP

Julius Baer e-Banking is optimised for desktops, tablets and smartphones and a mobile app is needed to login.

If you are a new e-Banking user, you first need to download the Julius Baer Mobile App to your mobile device. To activate the app, please refer to the Activation Guide on our e-Banking support site. Please refer to page 31 if you have already activated the app and want to activate/bind an additional e-Banking contract (User ID) in the same or a different booking centre location.

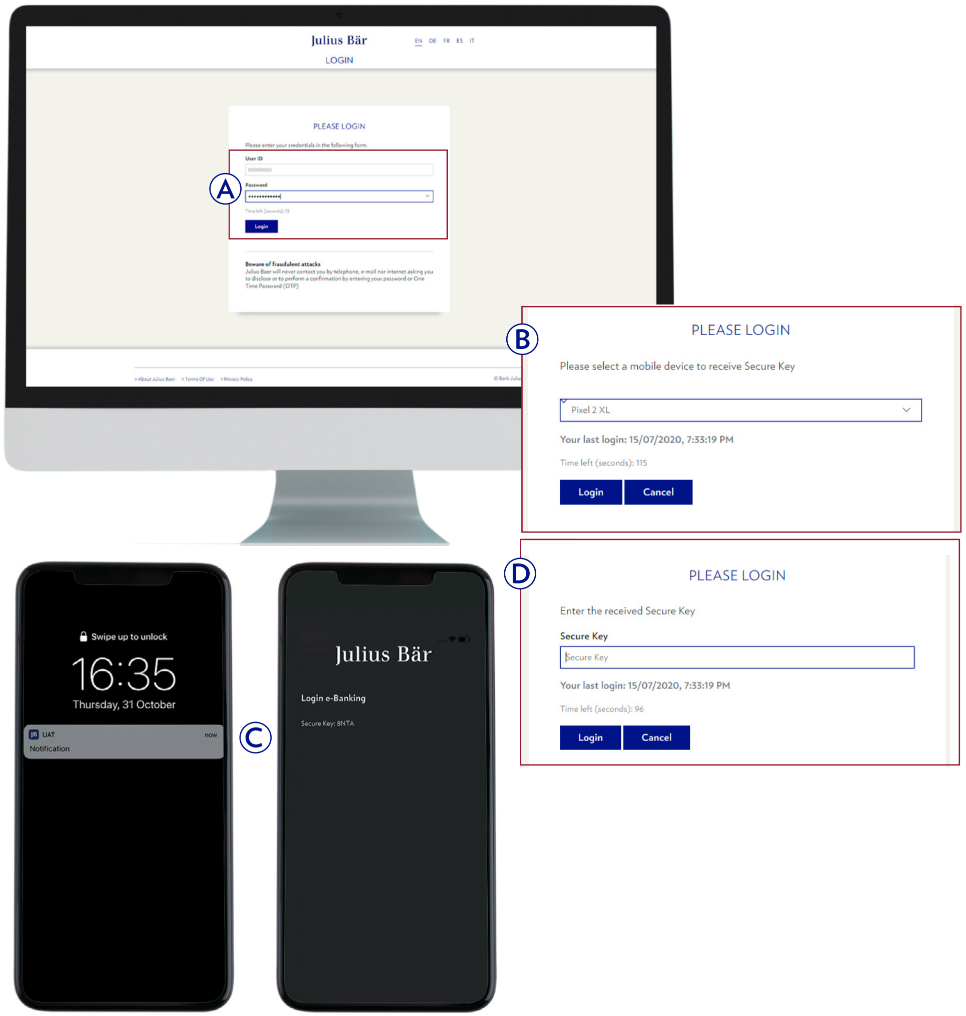
Login on desktop:
Access the e-Banking login screen on the Julius Baer website at www.juliusbaer.com/ebanking-asia

Ⓐ Enter your User ID and Password in the relevant fields and click **Login.**

Ⓑ If you have one registered device, the device name is pre-populated. Otherwise select the correct device from the drop down, and click on **Login.**

Ⓒ A push message has been sent to your registered mobile device. Click on it in order to obtain the secure key in the Julius Baer Mobile App.

Ⓓ Enter the secure key in the relevant field on your desktop and then click **Login** to e-Banking.



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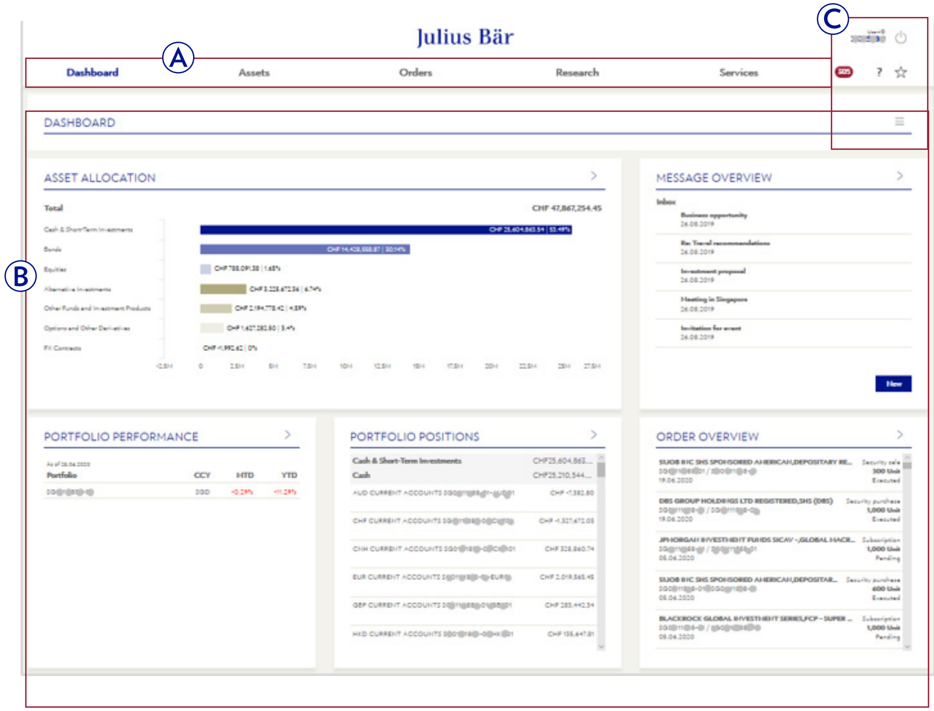
Refer to the activation guide if you are logging into e-Banking for the first time.

NAVIGATION

The navigation in Julius Baer's e-Banking is intuitive so that you can locate the desired functions quickly and easily. Please take a moment to familiarise yourself with the key elements of navigation.



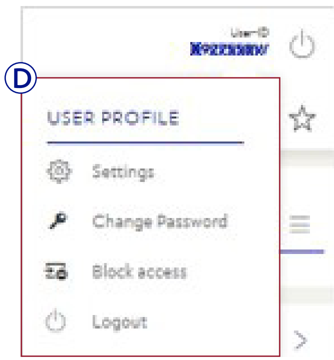
Ⓐ The global navigation gives you fast and direct access to all e-Banking functions.

Ⓑ The main content area shows you the relevant information and options for your current tab selection.

Ⓒ The following navigation elements are available on most screens:

- **Notifications** (see page 7 for more information)
- **Support** (see page 33 for more information)
- **Favourites** (see page 7 for more information)
- **Context Functions** (see page 7 for more information)
- **Logout**

Ⓓ Your User ID is displayed in the top right corner of each screen. Click on it to see a menu providing you with direct access to your settings as well as important service functions.



For security reasons, the system will prompt you with an alert message if you are inactive for 10 minutes. Shortly thereafter you will be automatically logged out if you stay inactive.

Please always use the logout button to end your e-Banking sessions.

DASHBOARD

The **Dashboard** provides you with an overview of your financial information. It is customisable and gives you convenient access to your banking needs.

Ⓐ The main content area shows you different boxes with useful information, called widgets.

Ⓑ Click on the icon in the top right corner of a widget (>) to directly access the respective e-Banking functions.

Ⓒ Click on the data inside a widget to see more details.

Customising your dashboard:

① Access the Context Functions menu (☰).

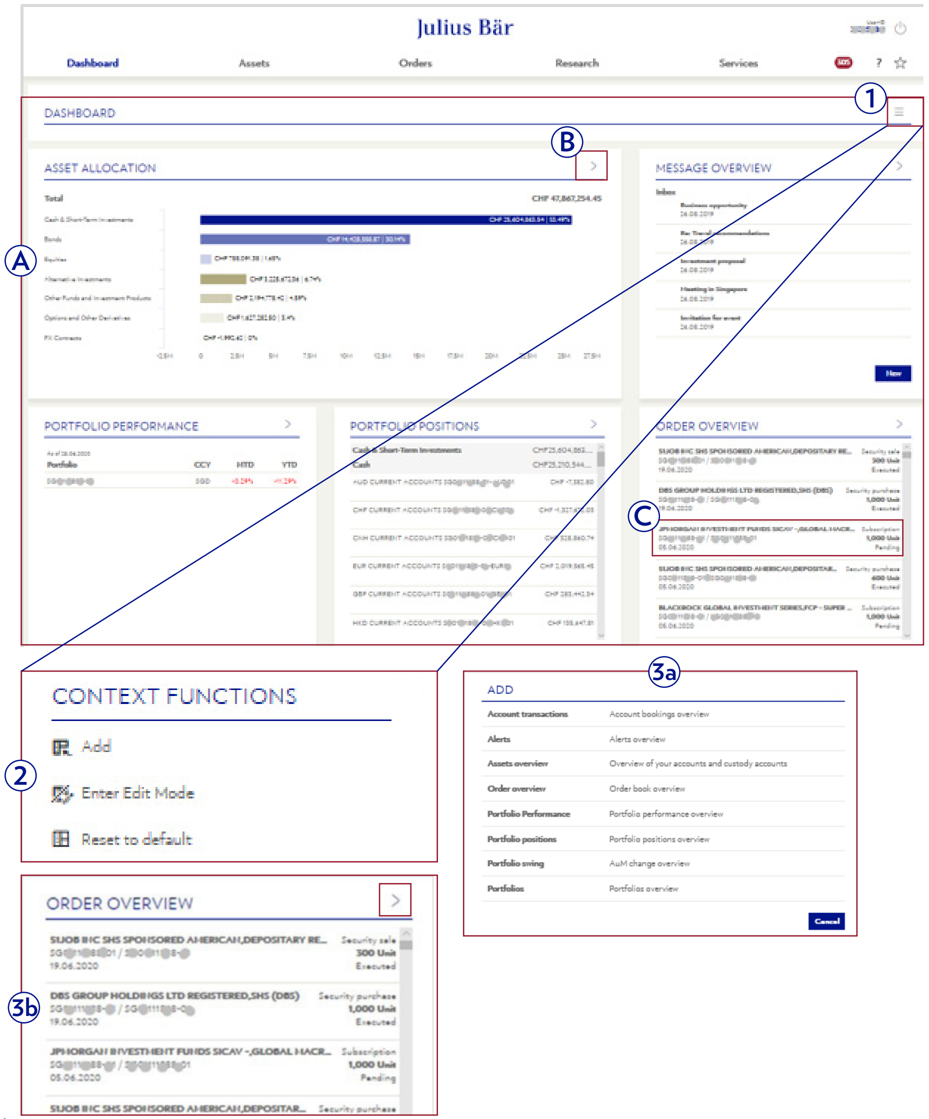
② Choose from the available options:

- Select **Add** to add a new widget to your dashboard (see 3a).
- Select **Enter Edit Mode** to move, delete or change the size of a widget, or to customise the displayed data inside a widget (see 3b).
- Select **Reset to default** to restore the original dashboard settings.

3a Click on a widget in the list to add it to your dashboard.

3b When you are in edit mode:

- Click on the bin icon (🗑) to remove a widget from your dashboard.
- Click on the cogwheel icon (⚙) to customise the displayed data inside a widget.
- To move a widget use drag and drop (✥).
- Click on **Leave Edit Mode** when you are finished.



CONTEXT FUNCTIONS, FAVOURITES, NOTIFICATIONS

Julius Baer e-Banking offers features that make your online banking experience efficient and enjoyable.

Ⓐ The **Notifications centre** (168) informs you if have received new insights, documents or messages. The red badges indicate the number of unread insights, documents and new messages in your inbox.

Click on a category in the list to access the respective functions.

Ⓑ The **Favourites** menu (☆) contains all shortcuts that you have created. Select a link from the list to access the respective function.

Click on **Edit** to change the order of your favourites or delete individual entries from the list.

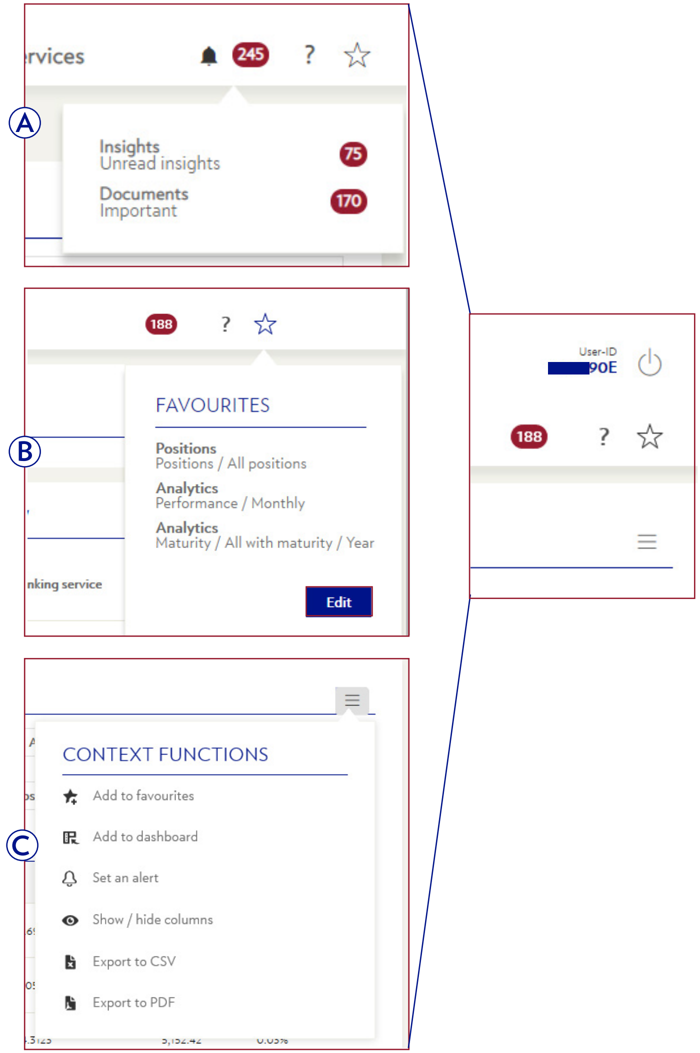
Ⓒ The **Context Functions** menu (☰) contains quick links to customise your e-Banking and to download relevant information to your computer.

Click on an item in the list to add the current screen to your favourites, for example, or to set up a new alert, or to change the table view to your needs. You may also have the option to download data in CSV or PDF format.

The available items may vary depending on the current e-Banking function and screen.

For greater convenience, use the widget 'Notifications' to see your notifications right on the **Dashboard** (see page 6 for details).

You can also set up **Alerts and Notifications** via push, SMS and/or e-mail for a variety of scenarios (see page 23 for details).



ASSETS OVERVIEW

Under the menu item **Assets → Assets overview** you can analyse the portfolio allocation across different criteria for all portfolios that are linked to your Julius Baer e-Banking access.

Ⓐ Analyse your assets with different criteria

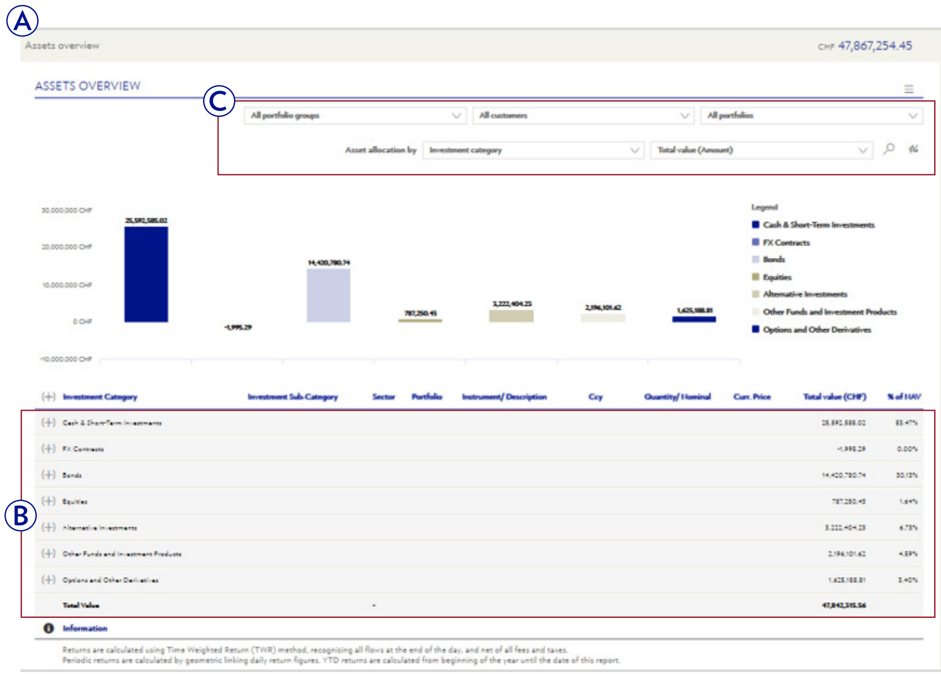
- The chart shows your asset allocation by investment category, sector or currency.
- A list of your positions grouped by the respective criteria is shown below the chart.

Ⓑ Drill down from asset class to **Positions**.

- Click ((+)) against the asset class name to view position summaries across different asset classes.

  For example, clicking ((+)) before the asset class 'Cash & Short Term Investments' will show you the breakdown of this class into sub classes – allocations in cash, deposits, loans and other short term investments.
- Click on an individual position to view further details on the position and the history.

Ⓒ Use the quick filters or search function to view the asset classes / positions that are relevant to you.



Use the Context Functions to customise the view and see the information that is most important to you or add to favourites (see page 7 for details). For example change the table view to your needs by showing or hiding columns.

POSITIONS

Under the menu item **Assets → Positions** you will find an overview page that provides all your positions arranged by asset class and their respective sub-asset classes.

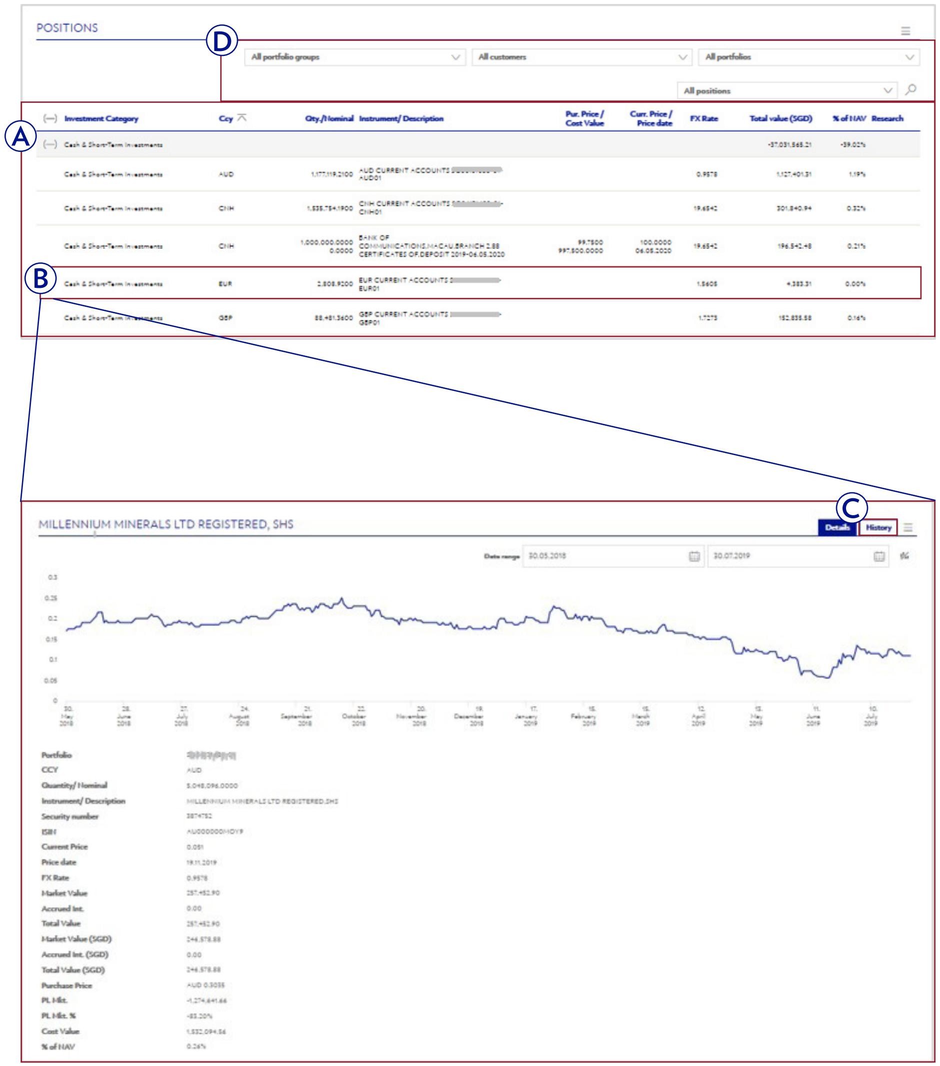
Ⓐ An option to view positions across different asset classes is available by collapsing ((—)) and expanding ((+)) an asset class.

Ⓑ Click on individual positions to view further details on the position including cost price, unrealised P&L, price history etc.

Ⓒ On a position, click on **History** to view all historical transactions which make up the position. Position history is available for the following asset classes:

I. Cash & Short Term (excludes deposits & loans) Investments
II. Bonds
III. Equities
IV. Alternative Investments
V. Other Funds & Investment Products

Ⓓ Use the quick filter or search function to view the positions that are relevant to you.



Position history is available since 01 April 2018.

Use the Context Functions to customise the view and see the information that is most important to you or add to favourites (see page 7 for details). For example change the table view to your needs by showing or hiding columns.

TRANSACTIONS

Under the menu item **Assets → Transactions** you will find an overview of all transactions related to your portfolio(s). The transactions are organised by asset class.

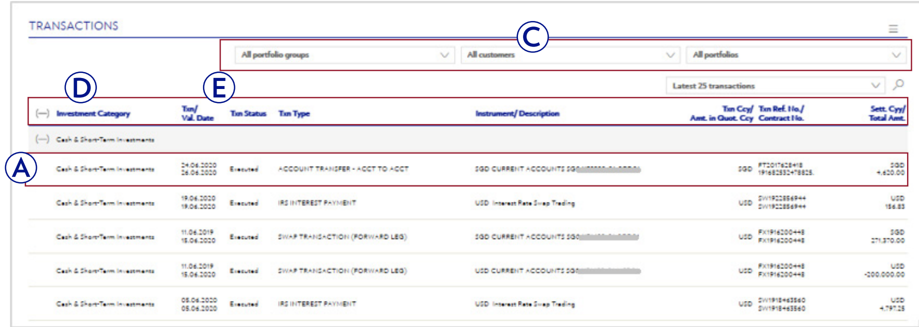
Ⓐ Click on an entry in the list to view transaction details of each individual transaction.

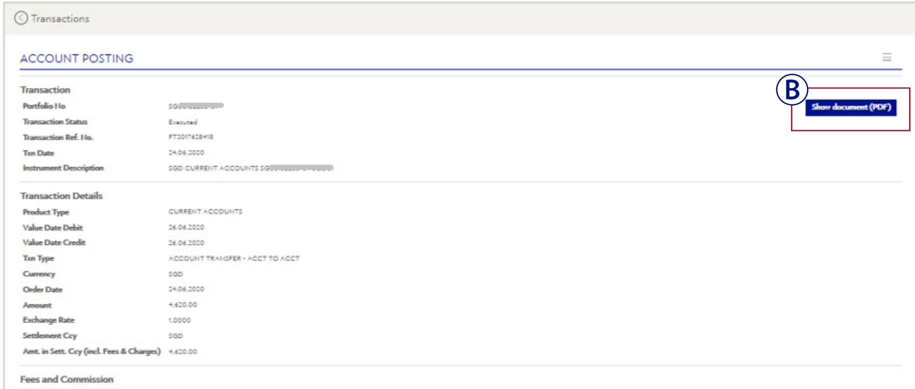
Ⓑ The transaction advice is available to download in PDF format. Click on the PDF icon in the Context function menu.

Ⓒ Use the quick filter or search function to view the transactions that are relevant to you.

Ⓓ The transactions can be grouped by portfolio number, date, investment category, instrument description or currency.

Ⓔ The transactions can be sorted by date, status, instrument description etc.





Use the Context Functions to customise the view and see the information that is most important to you or add to favourites (see page 7 for details). Change the table view to your needs by showing or hiding columns.

Transactions made after 01 April 2018 are available. For transactions before 01 April 2018, please contact your relationship manager.

PORTFOLIO GROUPS

Under the menu item **Assets → Portfolio groups** you can create and manage portfolio groups according to your specific needs. Portfolio groups can be used in the quick filters function, on other pages for example on Assets, Orders, Transactions and Analytics, to show the information that is relevant to you.

Ⓐ Select the tab **New search** to start a new search.

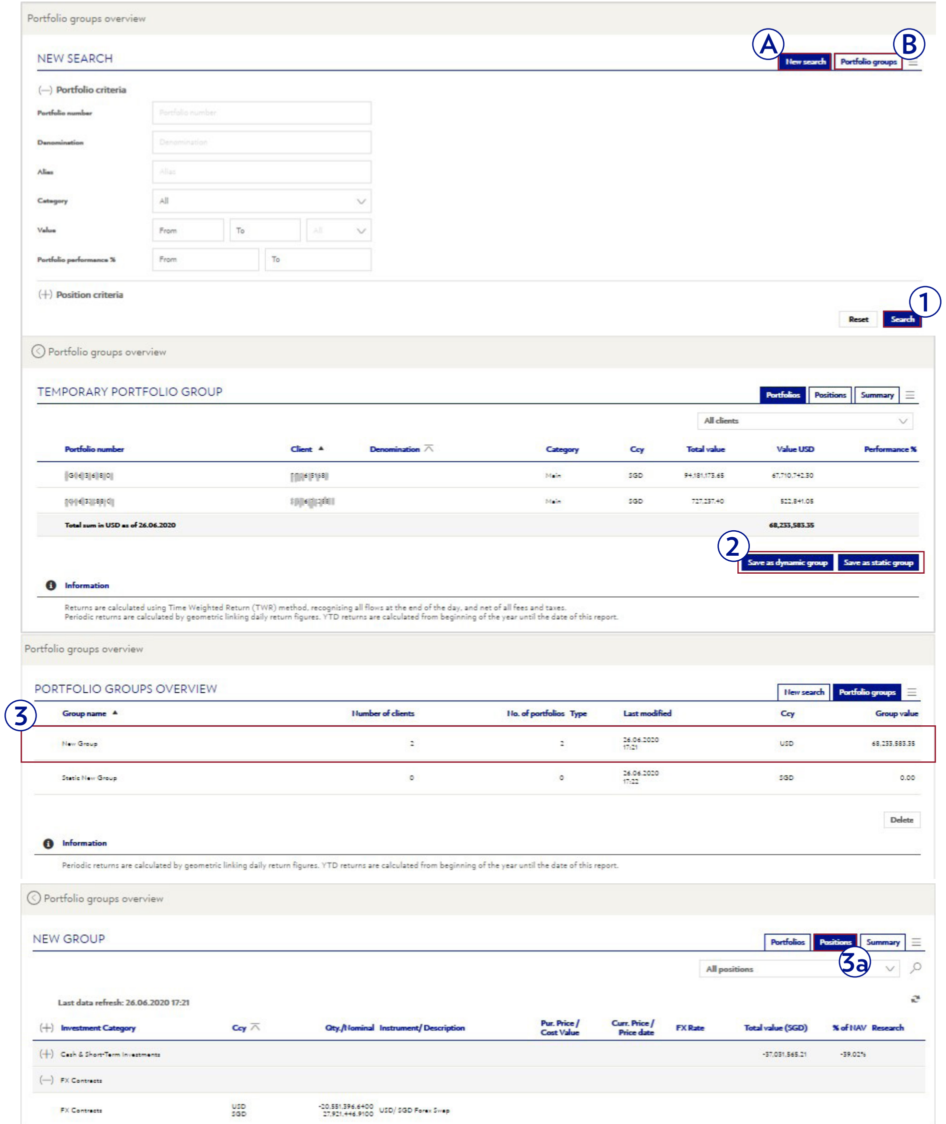
① Use the search function by selecting the criteria you are interested in: portfolio, or position. Click on **Search** to continue.

② On the next screen, click on **Save as static group** or **Save as dynamic group** if you want to create a new portfolio group. Static means that the composition of the portfolio group will stay constant over time, whereas dynamic means that the composition of the portfolio group will change as the underlying criteria changes.

Ⓑ Select the tab **Portfolio groups** to view a list of your portfolio groups.

③ Click on an entry in the list to view the portfolio group's details. Portfolio groups can be deleted or merged.

3a Select the tab **Positions** to view details on the positions in the respective portfolio.



ANALYTICS

Under the menu item **Assets → Analytics**, you can see detailed analysis of the various dimensions of your portfolio.

Ⓐ Select **Performance** to access an overview of the investment performance of your assets.

① Select from the available view options. You can monitor individual or consolidated performance of your portfolios and display charts to analyse your performance on a monthly or yearly basis.

② The charts show your monthly or yearly performance. You can see more details in the table at the bottom, such as the value of your portfolio at the end of each period.

The charts are based on historical performance. Yearly performance is available from 2015 onwards or from the inception date of the portfolio (whichever comes later).

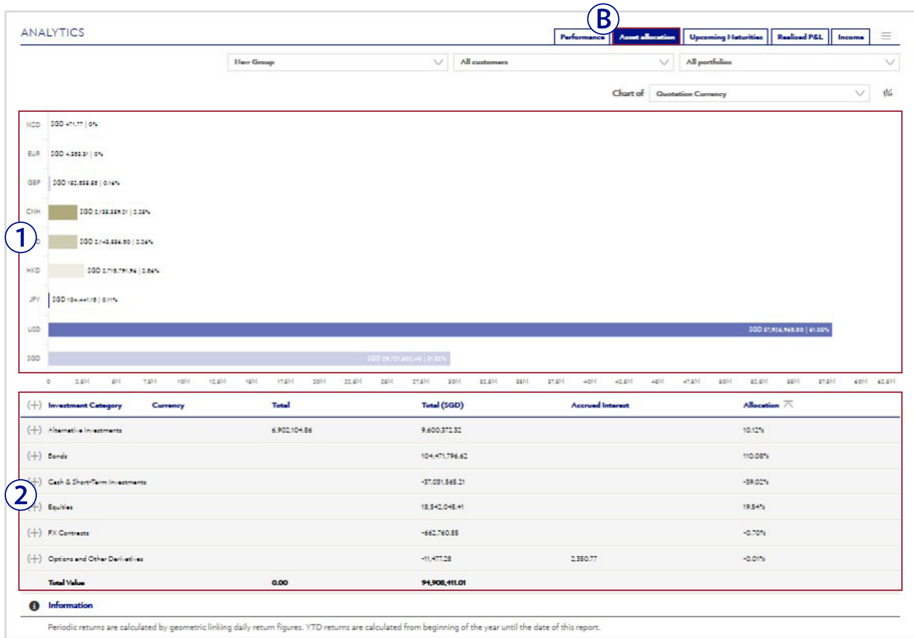
ANALYTICS

Under the menu item **Assets → Analytics**, you can see detailed analysis of the various dimensions of your portfolio.

Ⓑ Select **Asset allocation** to view your asset allocation and currency allocation.

① The chart shows your asset allocation by quotation currency or risk currency.

② A list of your allocation grouped by asset class and a break-down by various currencies is shown below the chart.



Use the Context Functions to customise the view and see the information that is most important to you (see page 7 for details). For example change the table view to your needs by showing or hiding columns.

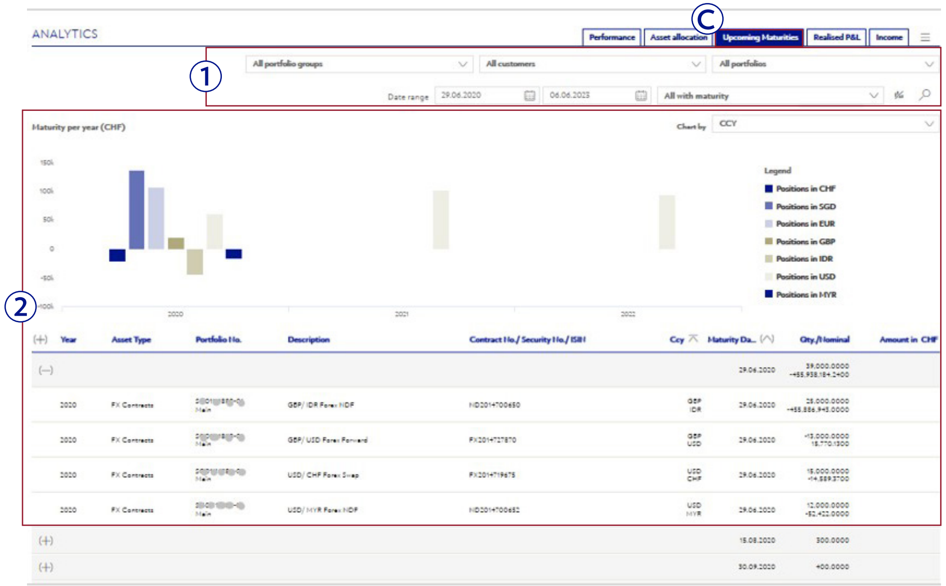
ANALYTICS

Under the menu item **Assets → Analytics**, you can see detailed analysis of the various dimensions of your portfolio.

Ⓒ Select **Upcoming Maturities** to see a preview of the upcoming capital maturities that you can expect from your current positions.

① Select a date range and use the quick filters to display the upcoming maturities of your positions that are relevant to you.

② The chart shows your upcoming maturities for each year or month either by currency or asset type. You can see more details in the table at the bottom, such as the individual positions and their maturity values.



Use the Context Functions to customise the view and see the information that is most important to you or add to favourites (see page 7 for details). For example change the table view to your needs by showing or hiding columns.

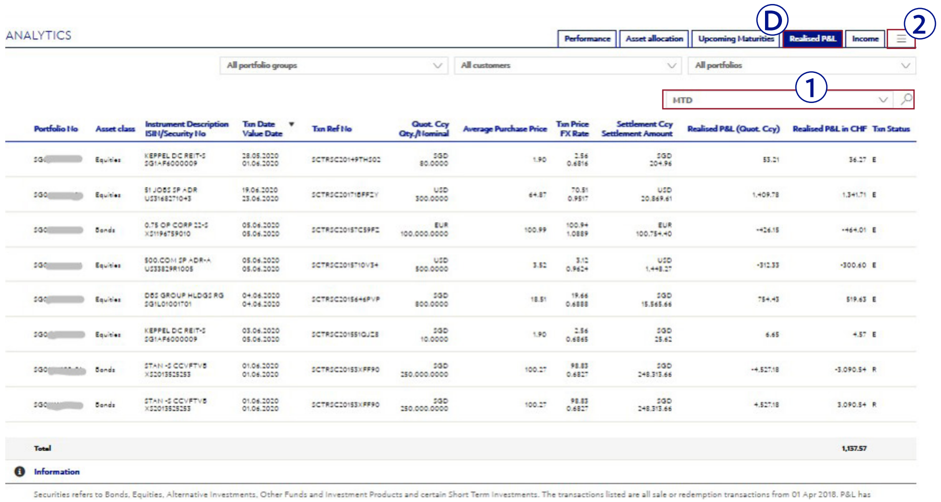
ANALYTICS

Under the menu item **Assets → Analytics**, you can see detailed analysis of your portfolio.

Ⓓ Click the **Realised P/L** to view the realised profits and losses incurred by the equities, funds, bonds, alternative investments, and other short term investment products within your portfolios or portfolio groups.

① Select a date range and use the quick filters to display the realised profits and losses of your positions within the specified time period.

② Click on the Context Functions menu in order to export the realised profit and losses in PDF or CSV format.



Unlike the other reports within Analytics, data fields displayed in the Realised P/L report are fixed and cannot be customised.

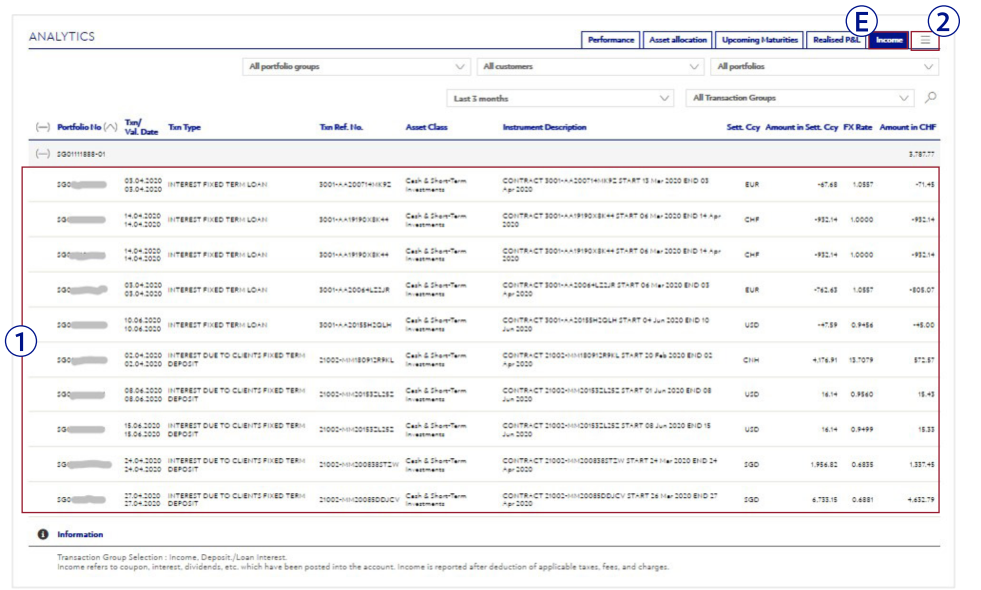
ANALYTICS

Under the menu item **Assets → Analytics**, you can see detailed analysis of the various dimensions of your portfolio.

Ⓔ Select **Income** for a summary of Income in your portfolio during any specific period.

① The view includes only Dividends, Coupon, Capital gains, Interest on Deposits and Loans, which have been posted to your portfolio.

② Click on the Context Functions menu in order to export the realised profit and losses in PDF or CSV format.



Use the Context Functions to customise the view and see the information that is most important to you. For example change the table view to your needs by showing or hiding columns.

Order history is available since 01 April 2018. For orders before 01 April 2018, please contact your relationship manager.

ORDERS

Under the menu item **Orders** you can track the trading history of your portfolio(s) including orders that are pending.

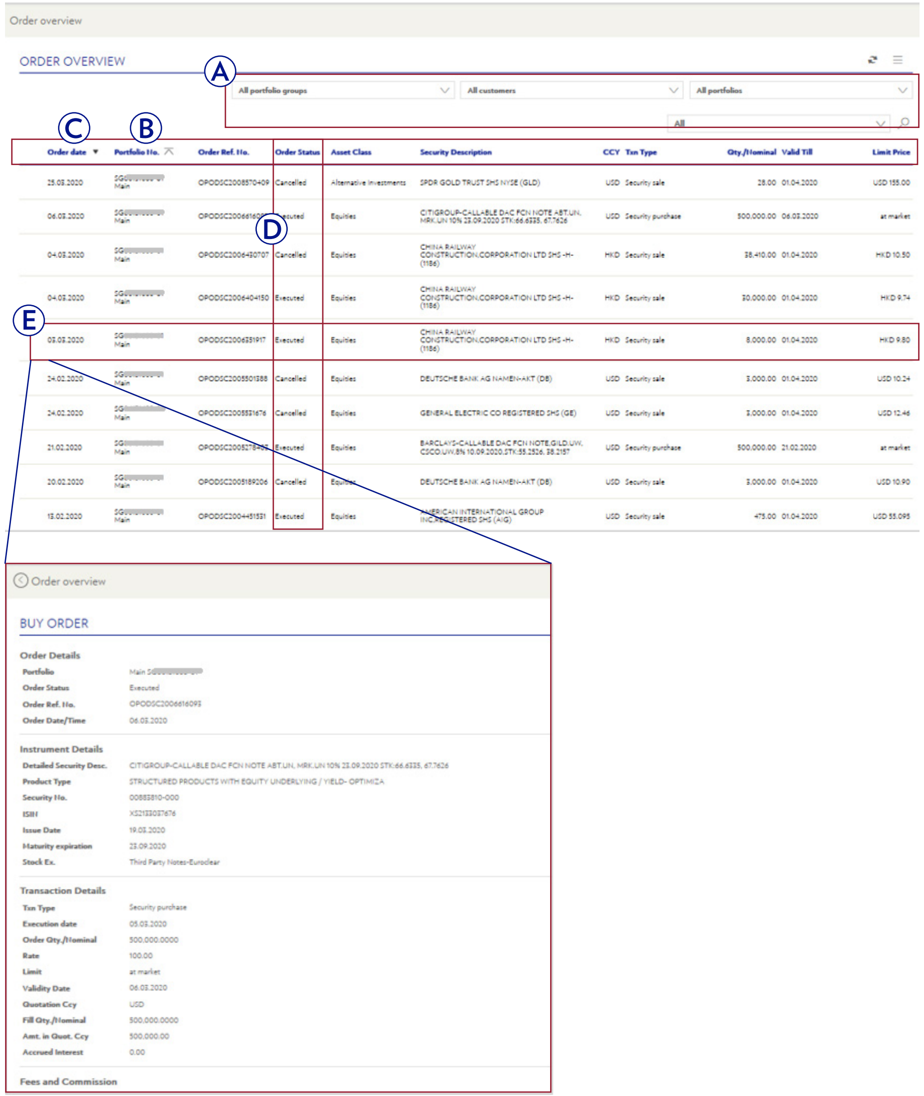
Ⓐ Use the quick filters or the search function to see the securities orders that are relevant to you.

Ⓑ The orders can be grouped by order date, portfolio number, order reference number, order status, asset class, currency, or type.

Ⓒ The orders can be sorted by date, order reference, order status etc.

Ⓓ The status messages helps you identify and track the progress of your orders.

Ⓔ Click on an order in the list to view its details.



Use the Context Functions to customise the view and see the information that is most important to you (see page 7 for details). For example change the table view to your needs by showing or hiding columns.

Order history is available since 01 April 2018. For orders before 01 April 2018, please contact your relationship manager.

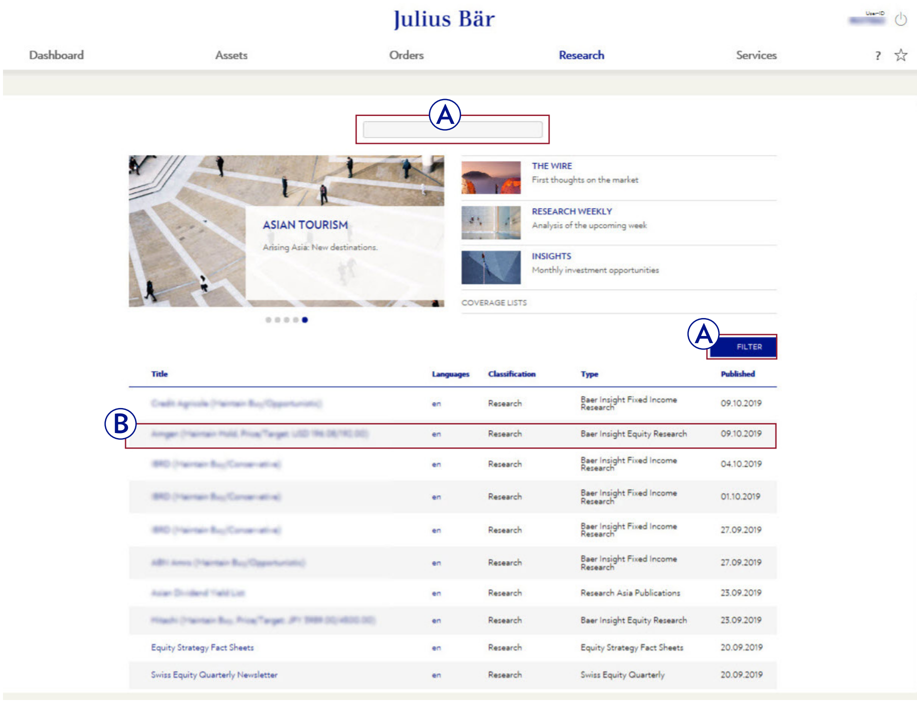
RESEARCH

Under the menu item **Research** you can access research information.

Ⓐ Use the search bar or quick filter functions to see publications relevant to you.

Ⓑ Click on a publication to view the details.

Research publications related to portfolio holdings are also visible in the Positions page.



This feature may not be available for some clients or countries.

INSIGHTS

CIO Insights publications provide a regular periodic market summary and outlook, accessible via mobile and desktop by clicking on the Notification Centre bubble, or by going to **Services → Insights**.

Desktop – Insights are accessible directly from the desktop by clicking on the Notification Centre bubble, or by going to **Services → Insights.**

Mobile – Insights can be viewed on the go, by opening the 'Hamburger Menu' then **Services → Insights.**

Activate Notifications – toggle notifications on/off via desktop, by clicking on (···) at the top of the **Insights** page.

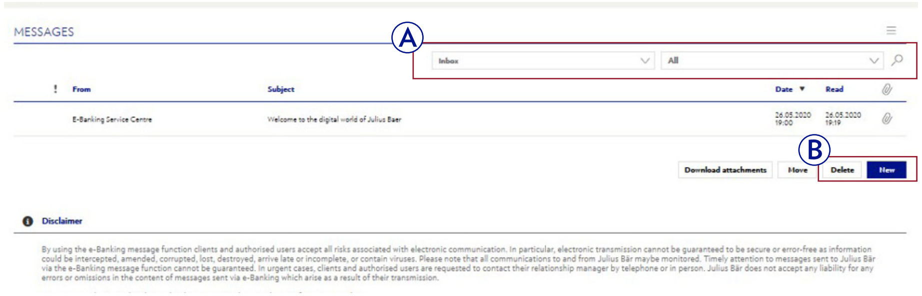
MESSAGES

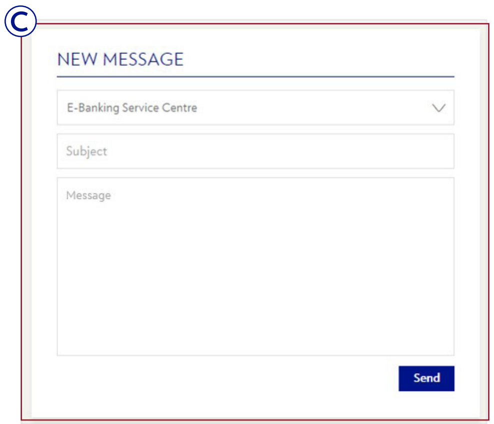
Under the menu item **Services → Messages** you can view your inbox and send secure messages to your relationship manager or the e-Channels Service Centre.

Ⓐ Use the quick filters or the search function to see the messages that are relevant to you. You can also create folders to organise your mailbox.

Ⓑ Unread messages are marked with a red dot. Click on a message in the list to view its details. You can create, move, or delete messages by clicking on **New**, **Move** or **Delete**.

Ⓒ For greater convenience, use the widget ‘Message overview’ to see your inbox right on the Dashboard (see page 6 for details). You can also use the widget ‘Enter message’ to create a new message with one click.





Unlike regular e-mails, messages and attachments sent in e-Banking are sent in encrypted format. However, alteration and falsification of the data during transmission over the Internet cannot be ruled out. The message function can be used to send confidential information to your relationship manager or for general inquiries. For orders or urgent inquiries, please contact your relationship manager directly.

You can receive **Alerts and Notifications** for new messages (see page 23 for details).

You are also notified of new messages by the red badge in the global navigation (168). Click on the icon to see the number of unread messages and to directly access your inbox.

DOCUMENTS & REPORTS

Under the menu item **Services → Documents & Reports** you can view and download all current and past banking documents in PDF format. In addition, you can generate ad-hoc asset and account statements online.

Ⓐ Use the quick filters or the search function to see the documents that are relevant to you. You can also create folders to organise your financial filing.

Ⓑ Unread documents are marked with a red dot. Click on a document in the list to view its details. You can download or move documents by clicking on **Download** or **Move**.

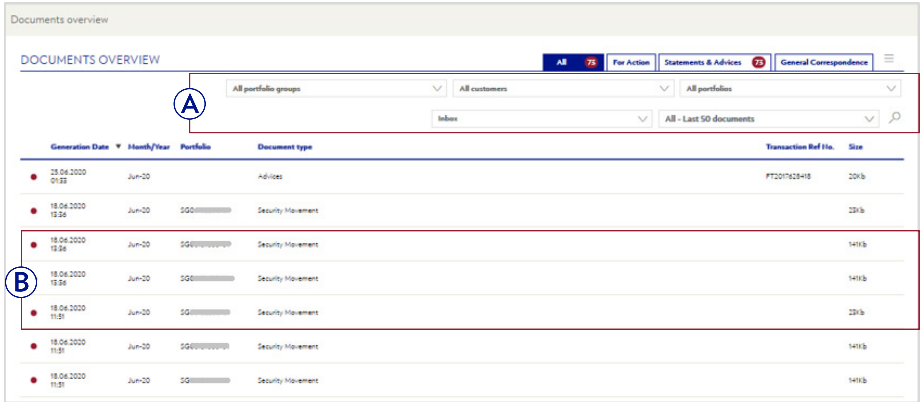
Ⓒ Click on **New request** to order online statements

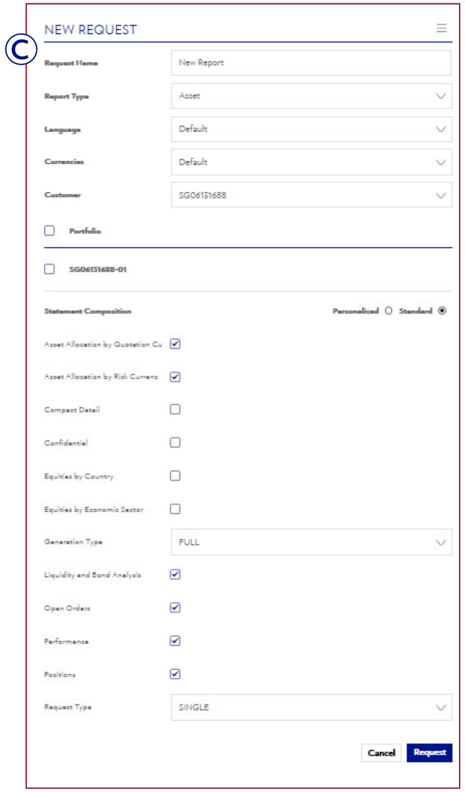
1. Select report type
2. Select parameters like language, currency, generation type and content (e.g. asset allocation, performance etc.)
3. Click on **Request**

You can receive **Alerts and Notifications** for new messages (see page 23 for details).

You are also notified of new documents by the red badge in the global navigation (7). Click on the icon to see the number of unread messages and to directly access your inbox.

You can use e-Banking to receive your standard bank documents electronically, instead of having them mailed as physical documents.



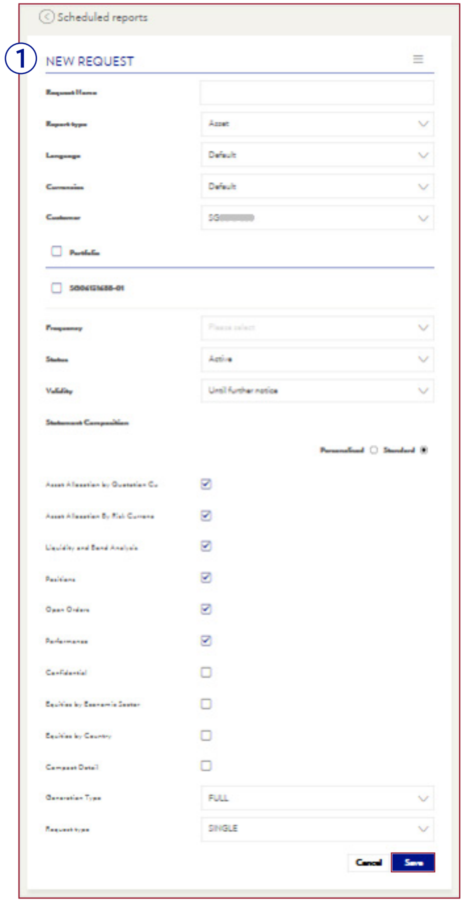


SCHEDULED REPORTS

Under the menu item **Services → Scheduled Reports** you can set up customised reports to be automatically delivered to you electronically at a convenient time.

Ⓐ Click on **New request** to schedule a new report.

① Name your request and select report type as well as other parameters and click on **Save** to schedule the report.

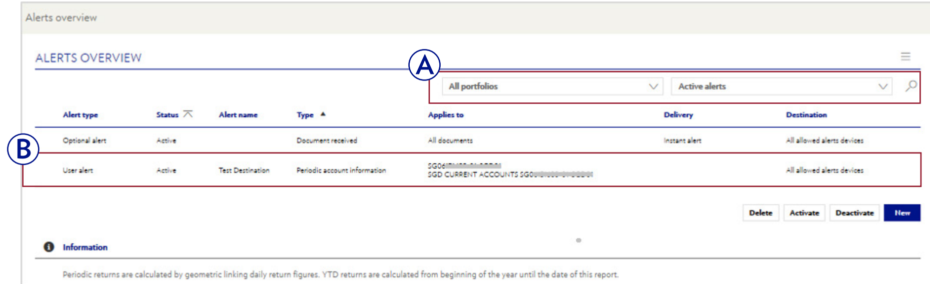


ALERTS AND NOTIFICATIONS

Under the menu item **Services → Alerts** you can manage or set up alerts via push SMS and/or e-mail for transaction status, selected account, portfolio, or inbox activities.

Ⓐ Use the quick filters or the search function to see the alerts that are relevant to you.

Ⓑ Click on an alert in the list to view its details. You can create, activate, deactivate, or delete alerts by clicking on **New**, **Activate**, **Deactivate** or **Delete.**



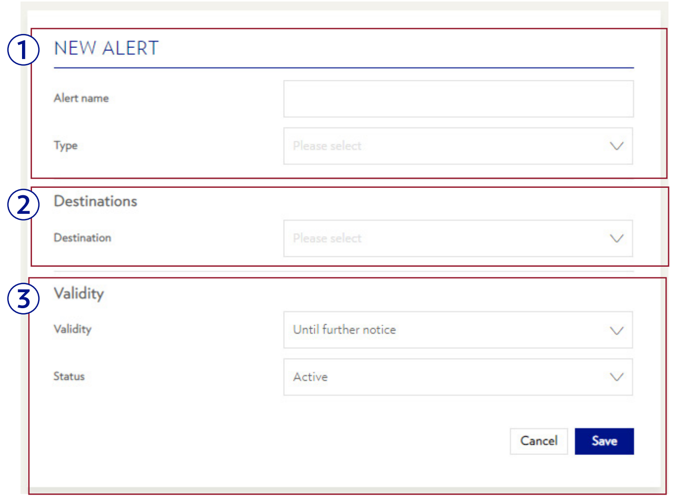
Creating a new Alert or Notification:

① Define a name and select the type of alert or notification you want to create.

② Select the destination delivery channel for the Alert or Notification (Push Notifications, SMS and/or e-mail).

③ Enter the validity and status (active/inactive). Click on **Save** to complete the set-up process.

You will receive a confirmation that the alert or notification has been set up succesfully.



For greater convenience, use the widget 'Alerts' to create and see your alerts right on the **Dashboard** (see page 6 for details).

Alerts can be enabled or disabled for any device bound to your e-Banking account. Please see Page 25, point 'D' for more details.

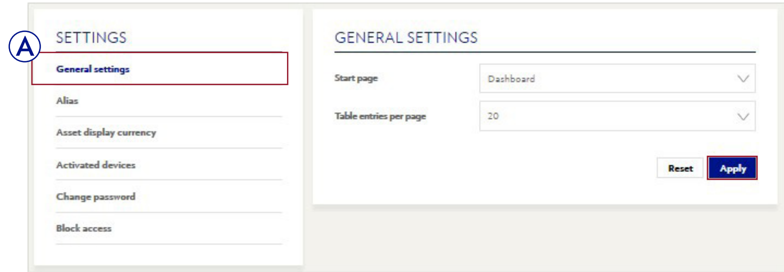
SETTINGS

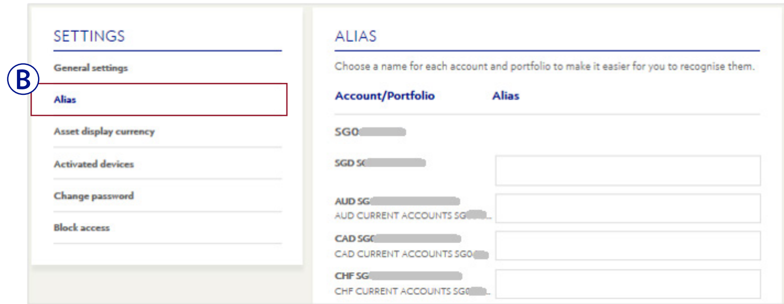
Under the menu item **Services → Settings** you can adjust the e-Banking settings to suit your individual preferences and needs.

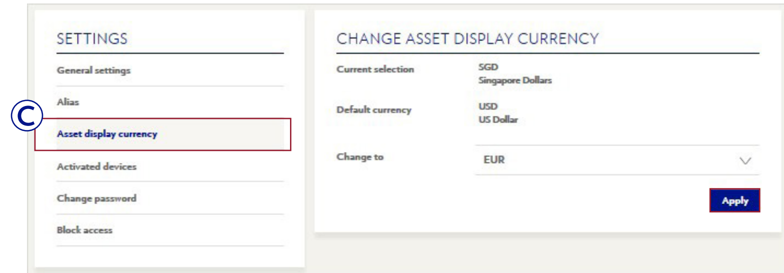
Ⓐ Select **General settings** to set the start page, number of table entries per page, and the presentation format of portfolio numbers. After you have adjusted the settings to your needs, click on **Apply.**

Ⓑ Select **Alias** to assign individual names to your portfolios. After you have entered the names in the relevant fields, click on **Apply.**

Ⓒ Specify the display currency to be used in charts and reports throughout the platform (desktop only).



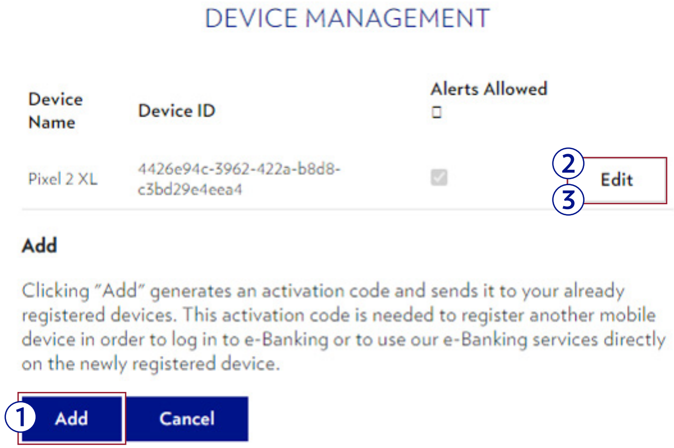


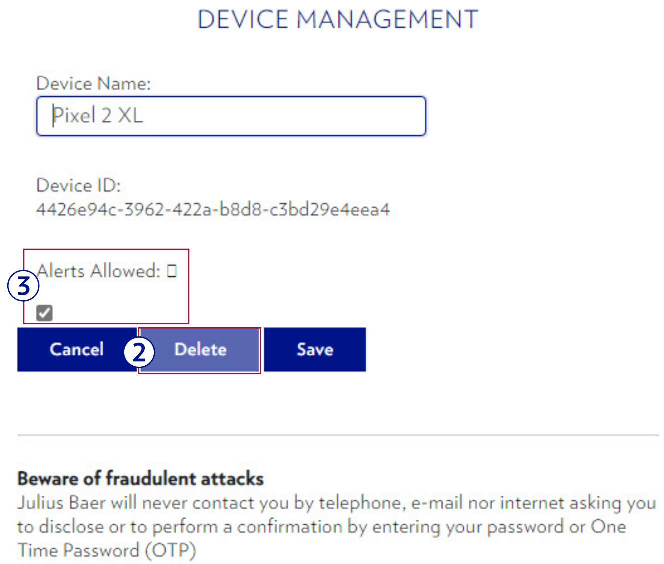


SETTINGS

(D) Click on **Activated devices** to view activated devices or to **add/bind** a new device, **delete/unbind** a device.

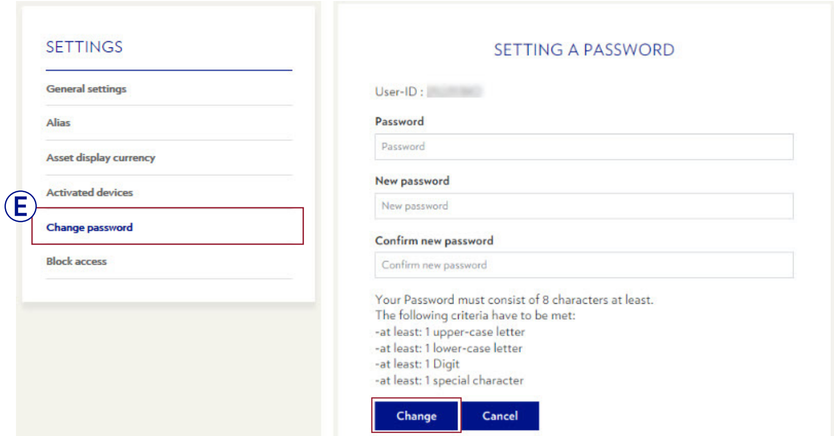
1. Add/bind a new device: Click on **Add**, then an Activation PIN will be sent to your device via SMS. Use this Activation PIN when prompted, during activation of the Julius Baer Mobile App, on the new device.
2. Delete/unbind an existing device: Click on **Edit** then **Delete**. Note - in order to unbind/delete the last bound device, please contact the e-Channels Service Centre
3. To edit the alert and notification settings of a device, click on **Edit**, tick/untick the **'Alerts Allowed'** and click **Save**.





SETTINGS

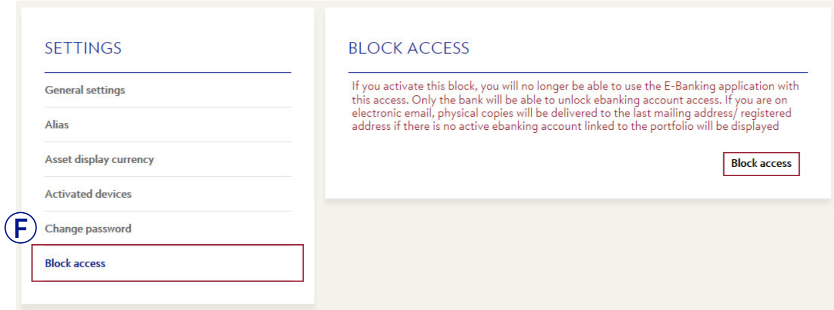
Ⓔ Select **Change Password** to change your login password for e-Banking. Enter your old and new passwords. Click on **Change** to confirm.



Your password must consist of at least 8 character and must meet the following criteria:

- at least 1 upper-case letter
- at least 1 lower-case letter
- at least 1 digit
- at least 1 special character (e.g. * or #)

Ⓕ Select **Block access** to prevent any further access to your e-Banking service. Click on **Block access** to activate the block.



Blocking the access to e-Banking cannot be undone. Once locked, e-Banking can only be reactivated by the Service Centre.

LOGIN ON MOBILE DEVICE
(USING USER ID & PASSWORD, IN ANDROID AND IOS)

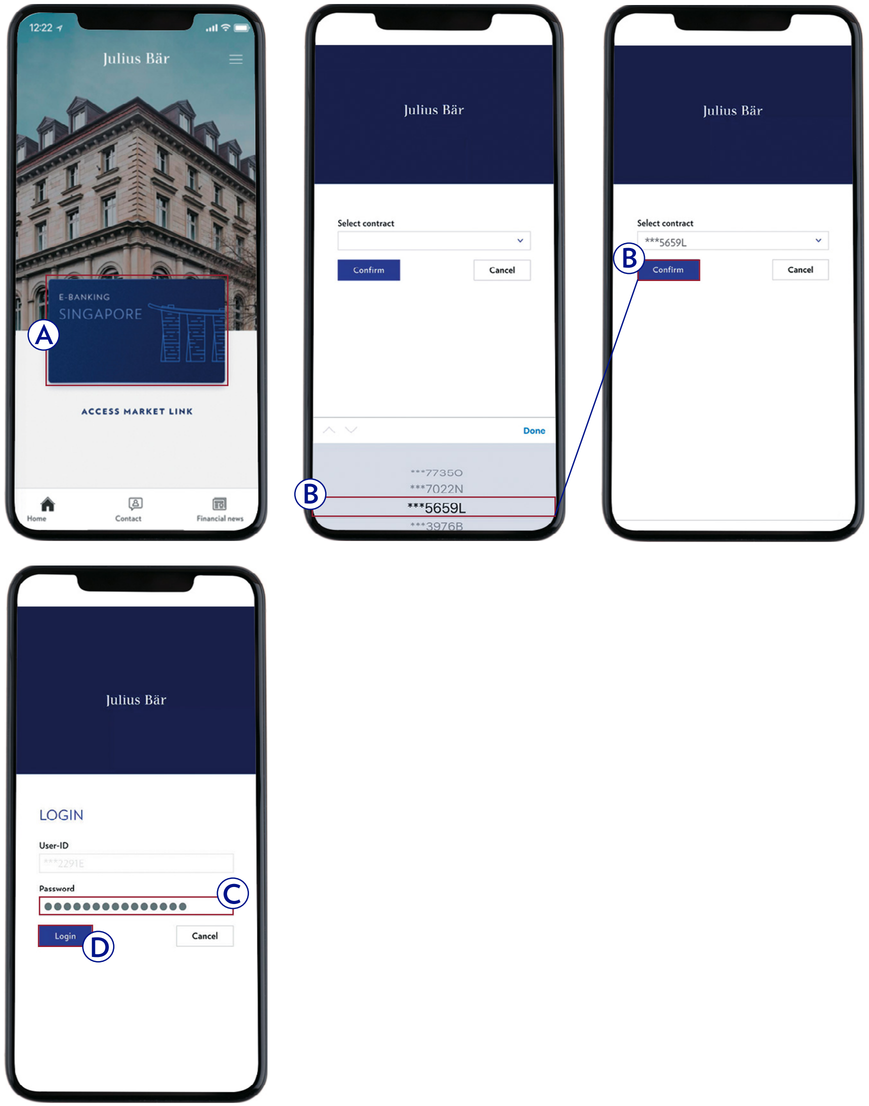
Login on mobile device

Ⓐ Select Mobile Banking Singapore or Mobile Banking Hong Kong

Ⓑ Select your User ID and click **Confirm.**
(If you have one User ID, this screen is not shown – proceed to step ‘C’ below.)

Ⓒ Enter Password.

Ⓓ Click **Login** to log in to Mobile Banking.



Please refer to the activation guide if you are logging into e-Banking for the first time or refer to page 31 if you have already activated the app and want to activate/bind an additional e-Banking contract (User ID) in the same or a different booking centre location.

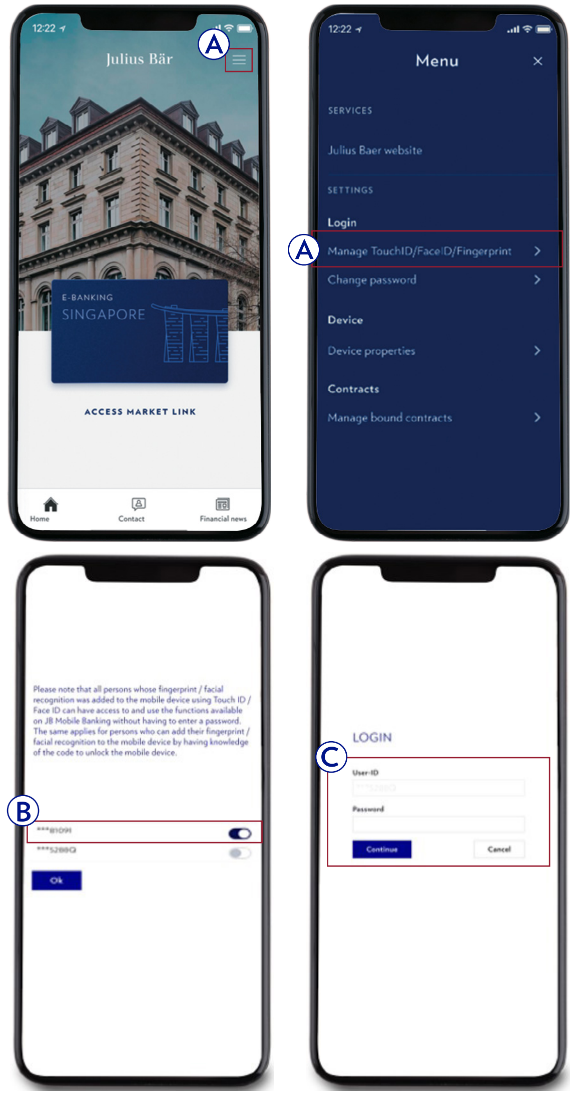
SETTING UP BIOMETRIC AUTHENTICATION

Setting up biometric authentication

Ⓐ From the Hamburger menu, select:
• Manage Fingerprint (available on Android and iOS)
or
• Manage Face ID (available on iOS only)

Ⓑ Select your User ID which will use biometric authentication, by clicking the toggle icon.

Ⓒ Enter your login details and press **Continue** to confirm your selection.



TouchID/Fingerprint: Place your finger on the fingerprint sensor to use Fingerprint instead of PIN.
FaceID: Keep mobile device at arm's length and position your face inside the frame.

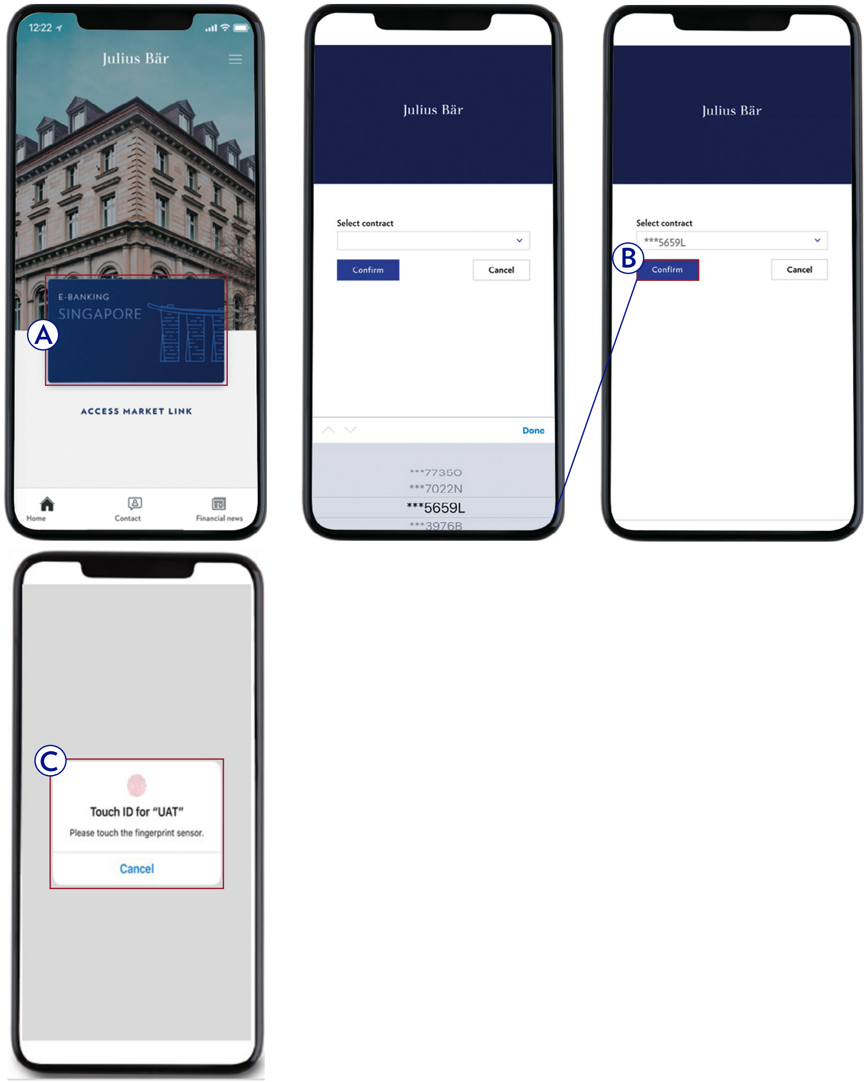
LOGIN ON MOBILE DEVICE
(USING FINGERPRINT, AVAILABLE VIA ANDROID AND IOS)

Login on mobile device

Ⓐ Select Mobile Banking Singapore or Mobile Banking Hong Kong

Ⓑ Select your User ID and click **Confirm.**
(If you have one User ID, this screen is not shown – proceed to step 'C' below.)

Ⓒ Fingerprint screen appears. Please place your finger on the phone's sensor.
Once the fingerprint is recognised by the device, you are logged into e-Banking.



Please refer to the activation guide if you are logging into e-Banking for the first time or refer to page 31 if you have already activated the app and want to activate/bind an additional e-Banking contract (User ID) in the same or a different booking centre location.

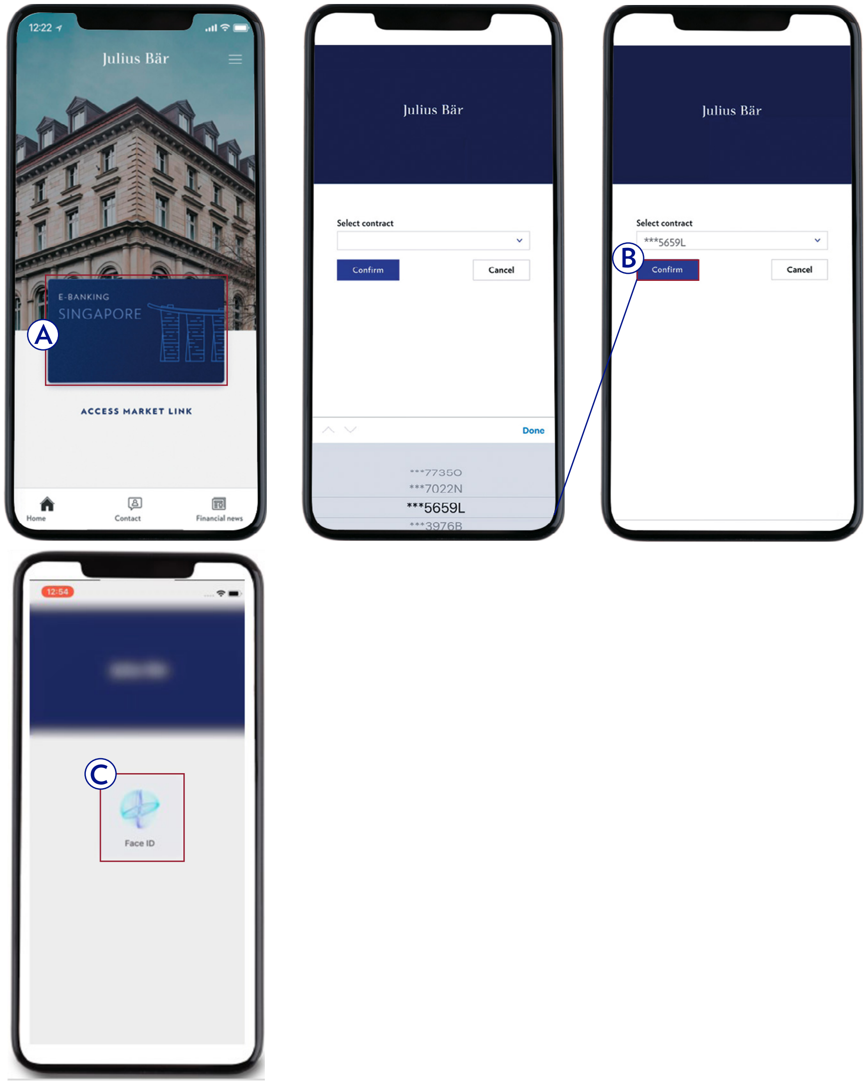
LOGIN ON MOBILE DEVICE
(USING FACE ID, ONLY AVAILABLE VIA IOS)

Login on mobile device

Ⓐ Select Mobile Banking Singapore or Mobile Banking Hong Kong

Ⓑ Select your User ID and click **Confirm.**
(If you have one User ID, this screen is not shown – proceed to step 'C' below.)

Ⓒ Face ID screen appears. Hold your mobile device at arm's length and position your face inside the frame. Upon successful Face ID check, you are logged into e-Banking.



Please refer to the activation guide if you are logging into e-Banking for the first time or refer to page 31 if you have already activated the app and want to activate/bind an additional e-Banking contract (User ID) in the same or a different booking centre location.

ACTIVATE ADDITIONAL E-BANKING CONTRACT

If you have already activated the Julius Baer Mobile app and want to activate/ add an additional e-Banking contract (User ID) in the same or a different booking centre location, follow the steps below.

Ⓐ Click on the context menu.

Ⓑ Click on **Manage bound contracts.**

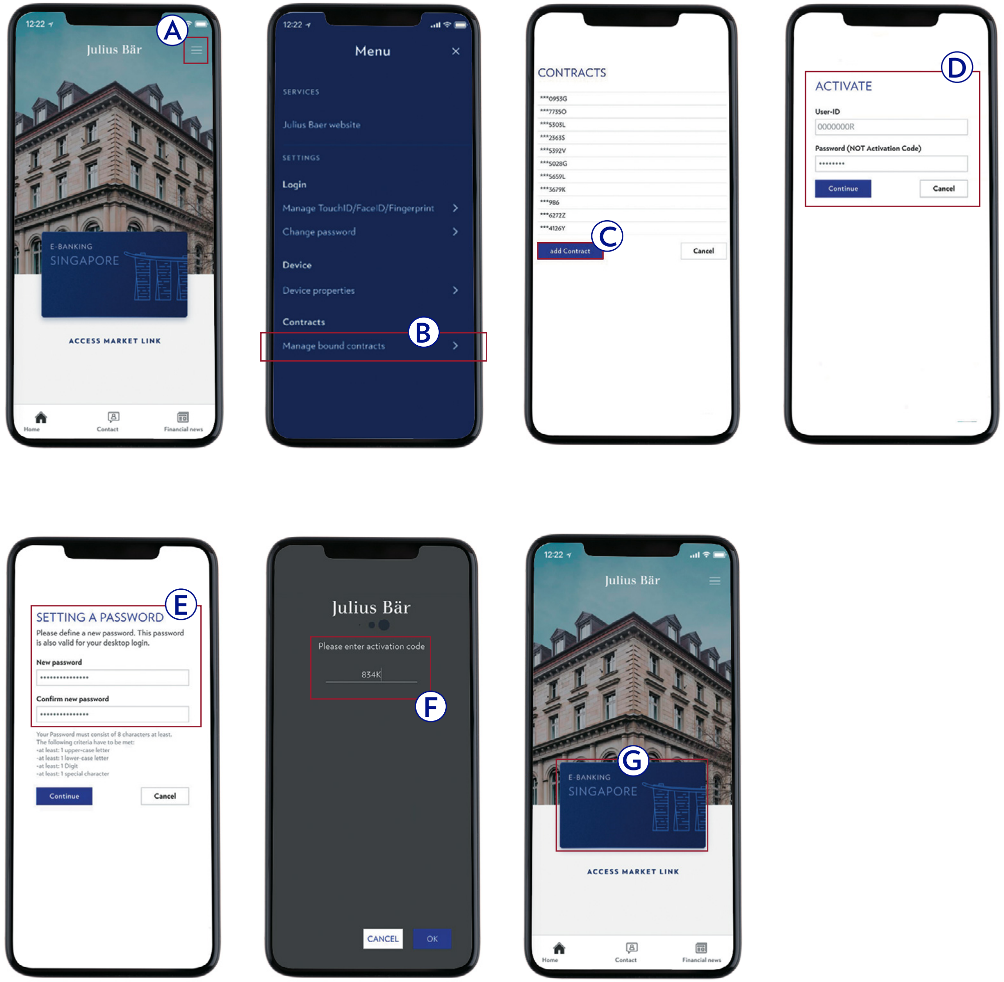
Ⓒ Click on **add Contract.**

Ⓓ Activate the new contract by entering your User ID and initial Password.

Ⓔ Create a new Password if requested.

Ⓕ Enter the Activation Code.

Ⓖ Activation is complete. Select the respective booking centre to login to Mobile Banking.



If you have previously activated your Julius Baer Mobile App as a client in another booking centre, please refer to the above steps to activate an additional e-Banking contract (User ID).

NAVIGATION

Navigation within the Julius Baer Mobile App is intuitive. You can locate desired functions quickly and easily.

Collapsible menu items allow for fast and direct access to various functions:

Ⓐ **Assets:** An overview of your portfolio. The charts show your portfolio overview and your monthly and yearly performance as well as your net money flows.

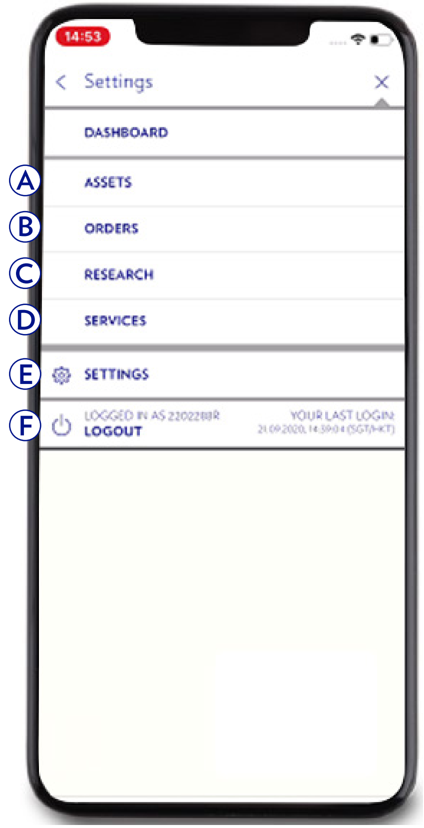
Ⓑ **Orders:** Look at your trading history including pending orders.

Ⓒ **Research*:** Access research information.

Ⓓ **Services:** Access to e-Documents and secure communication with your relationship manager or the e-Channels Service Centre.

Ⓔ **Settings:** Edit dashboard, reset dashboard, device bindings, alias.

Ⓕ **Logout:** To securely end the session, use the Logout button.



*This service may not be available in some countries and regions.

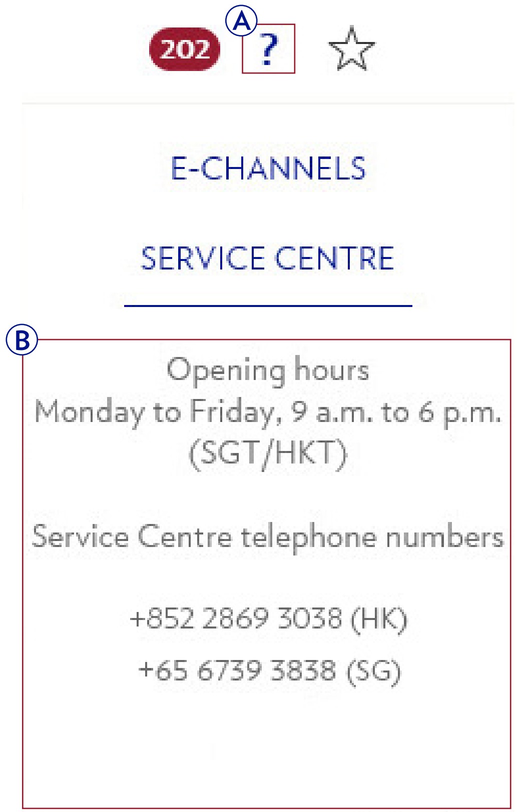
E-CHANNELS SERVICE CENTRE

Should you have any questions regarding e-Banking or need assistance to use the service, we are here to help. Simply contact our e-Channels Service Centre team and they will be happy to be of assistance.

Contacting the e-Channels Service Centre:

Ⓐ Click on the question mark (?) in the top navigation bar.

Ⓑ Call the e-Channels Service Centre on the telephone numbers provided. The opening hours are Monday to Friday, 9 am to 6 pm (SGT/HKT).



FREQUENTLY ASKED QUESTIONS (FAQ)

GENERAL INFORMATION

What are the key benefits of e-Banking?
With a fresh design and various personalisation options, Julius Baer e-Banking gives you convenient and secure access to your financial information any time, anywhere.

Key features are:
- View key information right on your dashboard
- Check your positions intraday
- Track the status of your securities orders
- Access Research information
- Set-up your own alerts via push notification
- Send secure messages to your Relationship Manager or the e-Channels Service Centre

What do I need in order to use e-Banking?
Authorisation to access a Julius Baer account, a designated e-mail address and mobile phone number, valid e-Banking Access Credentials and a smartphone or tablet with internet connection.

Is e-Banking compatible with tablets or smartphones?
E-Banking can be accessed on tablets or smartphones through the Julius Baer Mobile App. For tablets, the full desktop range of features are available. For smartphones, a reduced list of features is available.

How much does e-Banking cost?
E-Banking is a complimentary service offered by Bank Julius Baer to its clients.

ACTIVATION

What do I need to activate my e-Banking account?
You need a valid User ID, Password and a four-character Activation Code. Download the Julius Baer Mobile App on your smartphone or tablet to start the activation process. Please refer to the activation guide on our dedicated website for further instructions.

I am already using the Julius Baer Mobile App for another service offered in the app. How can I activate my e-Banking contract (User ID)?
If you have already activated the app, please refer to page 31 of the user guide on how to activate e-Banking contract (User ID) via the context menu or contact the e-Channels Service Centre for further assistance.

LOGIN

Why do I need my mobile device when I want to login to e-Banking on my desktop?
As an additional layer of security, a secure key is sent to your registered smartphone or tablet. This key needs to be entered on top of your User ID and Password in order to login on your desktop.

What should I do if I cannot access the login screen?
Please ensure you are using one of the recommended up-to-date browser versions, to access the login screen via www.juliusbaer.com/ebanking-asia.
- Edge
- Firefox
- Safari
- Chrome

Please contact the e-Channels Service Centre if you need further assistance.

FREQUENTLY ASKED QUESTIONS (FAQ)

How can I set up biometric log-in in order to use fingerprint or Face ID as authentication?
Please see the setup process depicted on page 28.

I have forgotten my e-Banking User ID, what do I do now?
In case you have forgotten your User ID and misplaced the e-Banking welcome letter, you can either login on your smartphone or tablet, where your User ID is saved or call the e-Channels Service Centre to retrieve your e-Banking User ID.

I have forgotten my Password. How can I reset it?
Please call the e-Channels Service Centre to reset your Password.

How shall I proceed if I cannot log in to e-Banking?
Please contact the e-Channels Service Centre for assistance.

How do I log out of e-Banking?
Click on **Logout** in order to properly end your e-Banking session.

BLOCK ACCESS

Can I block my e-Banking access?
You can manually block your e-Banking access in the Settings menu. Blocking the access to e-Banking cannot be undone. Once locked, e-Banking can only be reactivated by calling the e-Channels Service Centre.

What should I do if my e-Banking access is blocked?
In order to protect you from misuse and data theft, your e-Banking access is automatically blocked if several incorrect login attempts have been made. Please contact the e-Channels Service Centre to unblock your e-Banking access.

SECURITY

What should I do if the e-Banking session ends unexpectedly?
Please check your Internet connection. If the problem persists, please contact the e-Channels Service Centre.

How do I protect myself against hacker attacks?
By using up-to-date antivirus software, a firewall, and regular software updates, you lay the essential foundations for secure computing and secure e-Banking. If you notice any irregularities or unusual occurrences during your e-Banking session, contact the e-Channels Service Centre immediately. These might include unusual error messages, the appearance of pop-up windows or other similar issues. In addition to these technical measures, which greatly help to protect your computer, certain behavioural rules also need to be adhered to. Distrust e-mails from unknown senders. Be careful about opening e-mail attachments or clicking on links. For more detailed information, please refer to the security advice available on our website.

What happens if my computer crashes while I am using e-Banking?
Log back in to e-Banking and check if your last action has been completed and recorded correctly. If you are uncertain or have questions, please contact the e-Channels Service Centre.

Why do I have to log in again after leaving e-Banking idle for a few minutes?
As soon as the e-Banking system detects that there has been no activity for ten minutes (default fixed setting), a timeout kicks in and blocks the application. This is for your security and helps to prevent unauthorised persons from looking at your data.

What should I do if the login device is lost or stolen?
Please contact the e-Channels Service Centre immediately. It is important to inform the e-Channels Service Centre about any lost or stolen login devices in order to avoid any potential misuse by unauthorised persons.

FREQUENTLY ASKED QUESTIONS (FAQ)

ASSETS

Where can I download a copy of my asset statement?
You can download an asset statement on the Documents & Reports page.

How can I customise the Assets overview page?
Click on the Context Functions menu and select 'Show/hide columns' to adjust the columns to suit your needs (see page 7 of the user guide). This function is also available on Positions, Transactions, Orders and Analytics page.

Which reference currency is shown in e-Banking?
The reference currency to be shown can be chosen under Settings in e-Banking.

SERVICES

Can I activate/add more than one e-Banking contract (User ID) with the *same* device?
Yes, this functionality is supported. Please refer to page 31 of the user guide on how to activate an additional e-Banking contract (User ID) or contact the e-Channels Service Centre for more information.

Can I use the same e-Banking contract on additional devices?
Yes, you can add up to 4 devices to one e-Banking contract (User ID). Under Settings you can see all the activated devices for that e-Banking contract and add more devices. Pleaser refer to page 25 of the user guide or contact the e-Channels Service Centre for assistance.

What do I need to consider when using the messages function?
Unlike regular e-mails, messages and attachments sent in e-Banking are sent in encrypted format. However, alteration and falsification of the data during transmission over the Internet cannot be ruled out. The message function can be used to send confidential information to your relationship manager or for general inquiries. For orders or urgent inquiries, please contact your relationship manager directly.

What do I need to bear in mind when writing a new e-Banking message?
Do not use any special characters, such as combinations with apostrophes, in the subject field.

I have set up a new alert and the notification criteria has since been met. Why haven't I seen the alert or notification on my mobile device?
Alerts must be enabled for each device bound to an e-Banking account. Please see Page 25, point 'D' for more details.

SUPPORT

What are the telephone numbers of the e-Channels Service Centre?
You can reach the e-Channels Service Centre at +852 2869 3038 (HK) or +65 6739 3838 (SG).

When can I reach the e-Channels Service Centre?
The e-Channels Service Centre is available Monday to Friday, 9 am to 6 pm (SGT/HKT).

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