

Vontobel SFA Online

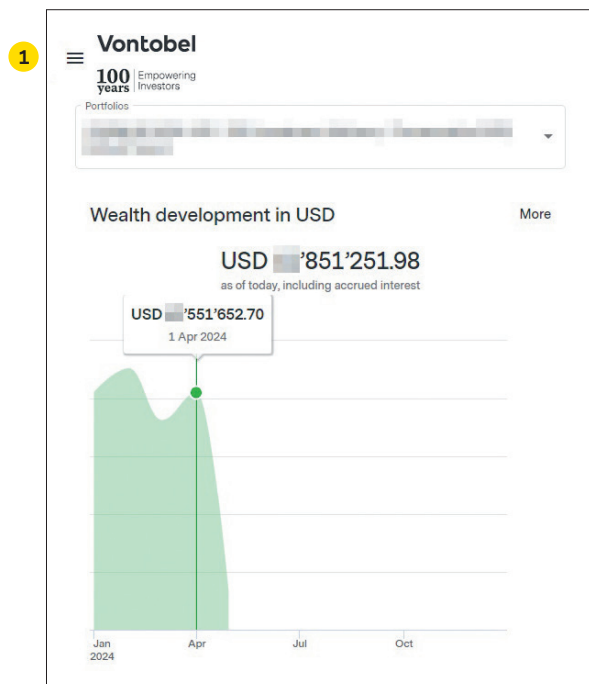
User guide



Landing Page

1. Dashboard

The Dashboard of SFA Online provides a high-level overview of Wealth development and Performance development, Asset allocations by asset class and by risk currencies for selected client portfolios. The main menu can be revealed by clicking on Icon 1



Main Menu

2. Home

The Home icon takes you back to the Dashboard page

3. Accounts

- Snapshot of all your accounts with the option to show the values in various currencies
- **Account Statement:** review the closing balance, total debits, total credits with the option to filter on booking type, transaction type, transaction date, min and max amounts
- **Account Overview:** details about your account, including the product, currency, account number, opening date, IBAN number and balance details

4. Positions

Explore your liquidity, equities and other investments filtered by portfolio, by asset class and by currency. Your preferred reporting currency is set as default—it can be replaced by a different currency

5. Portfolios

- List of your portfolios with values of each portfolio and the total value of all of your portfolios in various reporting currencies
- **Overview:** Evaluate your total wealth, year-to-date (YTD) and cumulative performance, asset allocation by asset classes and risk currencies as well as graphical representation of Wealth, Performance and Cumulative performance development

- **Positions:** Examine your positions by asset class and by currency
- **Bookings:** Review transactions by your preferred time periods and transaction type. Review booking details

6. Documents

- **Documents Overview:** Review your portfolio statements and account statements. Order portfolio statements and account statements for specific accounts with various date ranges
- **Report Subscriptions:** Review your standing subscriptions, order weekly, monthly, quarterly or yearly account and/or portfolio statements

7. Contact SFA









- **New Request:** Request an Appointment, a Phone call or Information regarding opening a new account, question regarding one of your portfolios, raise an issue with SFA Online or contact SFA for other reasons
- **Requests Overview:** Review your open requests, filter by request type, status or timeframe. Save your defined filters

8. Notifications

Set up new notifications for new messages and new documents in SFA Online. Review, modify, deactivate or delete notifications for your portfolios

9. News

Access to exclusive Vontobel articles, publications, events of webcasts

- 2  Home
- 3  Accounts
- 4  Positions
- 5  Portfolios
- 6  Documents
- 7  Contact SFA
- 8  Notifications
- 9  News

[Legal information](#) · [Privacy Statement](#) · [Help](#)

Account Settings

- Clicking on the User icon will expand the Account Settings menu

11. Accounts & Profile

Change reporting currency, default account and time period, rename your account and portfolio names as well as updating your residential address and document mailing methods

12. Language: English

The default language of your SFA Online is English

13. Change password

Change your password for SFA Online

14. Log out

Safely and securely exit your Vontobel SFA Online

