



User Manual



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Register New Account

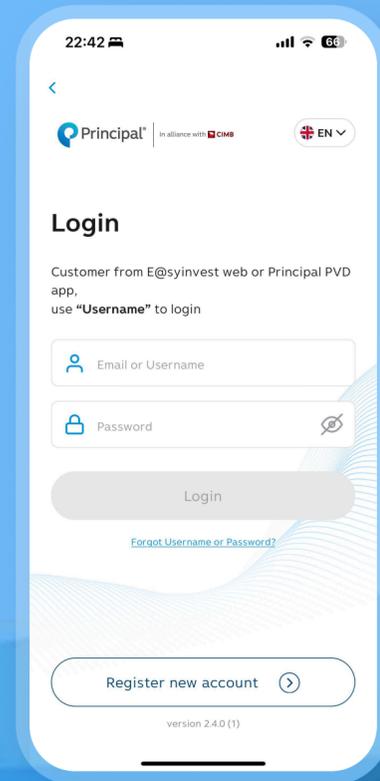
1

Open Mutual Fund Account

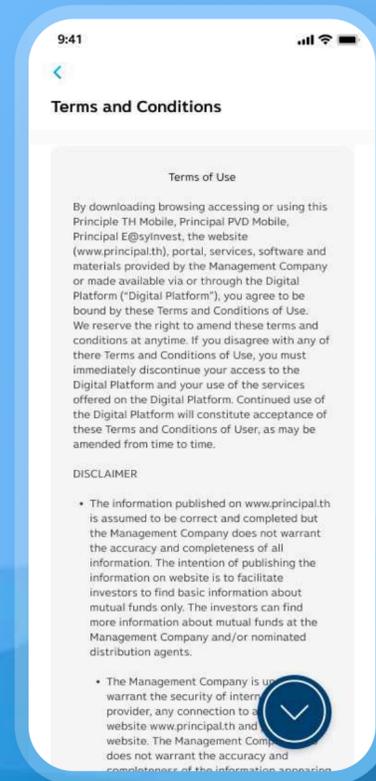
6

Register New Account

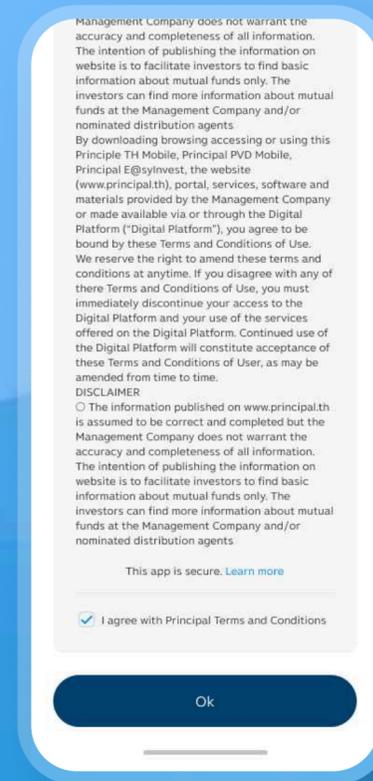
Register New Account



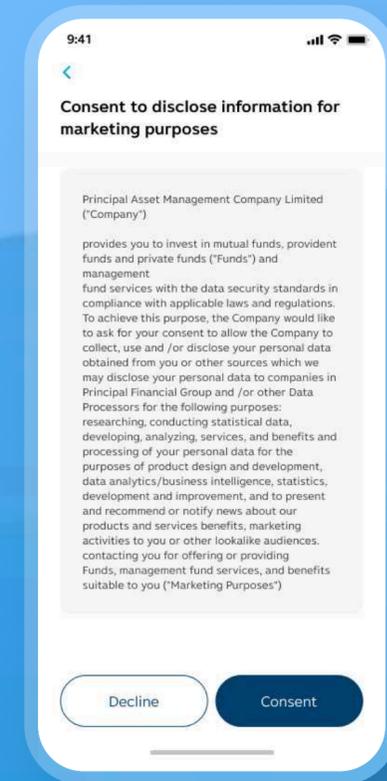
1. Click “Register new account”



2. Read the terms and conditions



3. Accept all terms and conditions.



4. Read the marketing consent and provide your consent information to continue.

Register New Account

22:45

Confirm Email

Please enter your email to verify your identity before logging in. The system will send a verification code to the provided email for identity and security verification.

email *

Request OTP

5. Fill in your email, and click “Send verification email” to continue.

9:41

One-Time Password (OTP) for Identity Verification with Principal TH

Principal TH nonreply 26 0.0.

Dear longtoon@gmail.com,

1 2 3 4 5 6

Please use the following One-Time Password (OTP) to complete the process.

- Username : longtoon@gmail.com
- Ref no: PR1234

This OTP is valid for 5 minutes. For your security, please do not share this code with anyone.

If you did not initiate this request, please contact Customer Service immediately at +(662) 686 9500.

6. The system has sent an OTP to the email address you provided.

9:41

Verify OTP

The code has been sent to your email longtoon@gmail.com

OTP expires in 3:00 minutes

Resend OTP (30)

1 2 3
4 5 6
7 8 9
0

7. Verify OTP

15:14

Create Password

Please enter a password that is 8–12 characters long

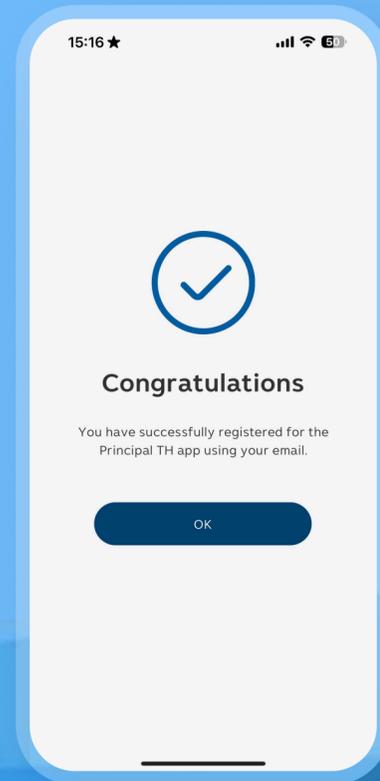
Password *

Confirm Password *

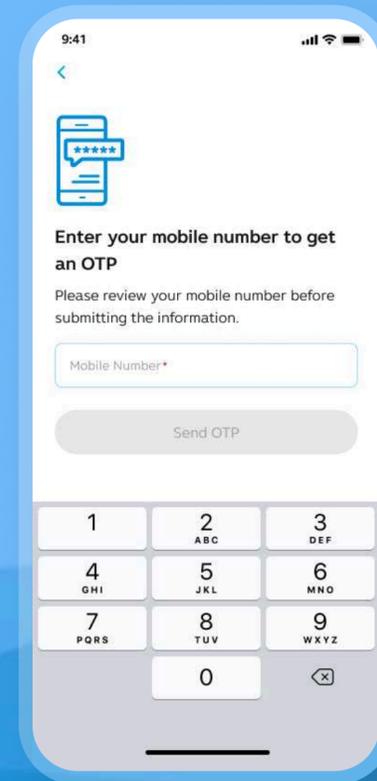
Create New Account

8. Create password

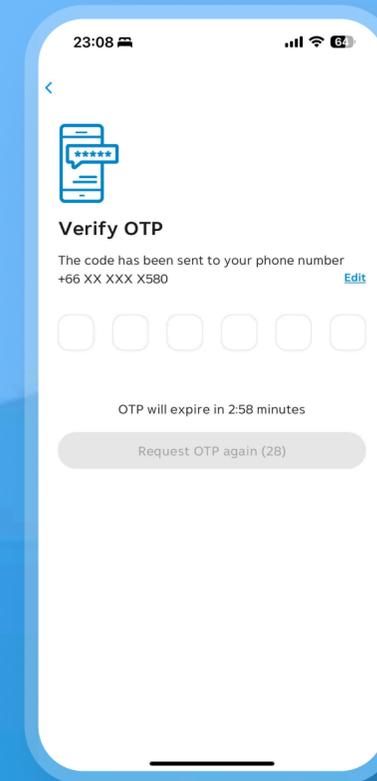
Register New Account



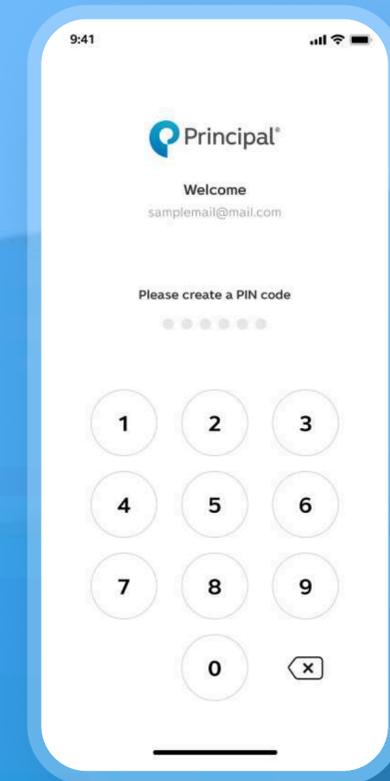
9. Your account has been verified.
Click "Ok" to continue.



10. Fill in your phone number
to get OTP.

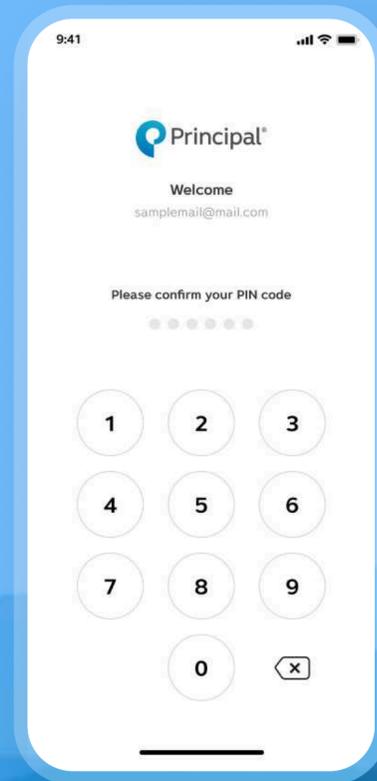


11. Verify OTP

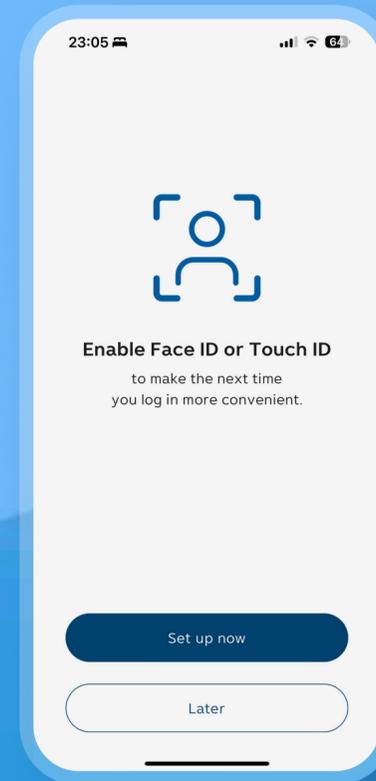


12. Create PIN Code

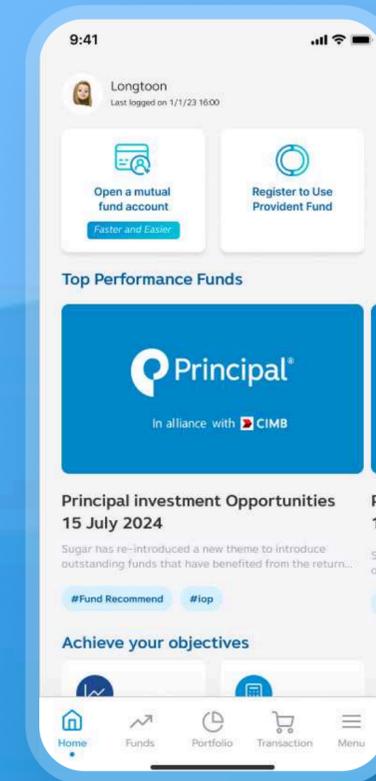
Register New Account



13. Confirm PIN Code



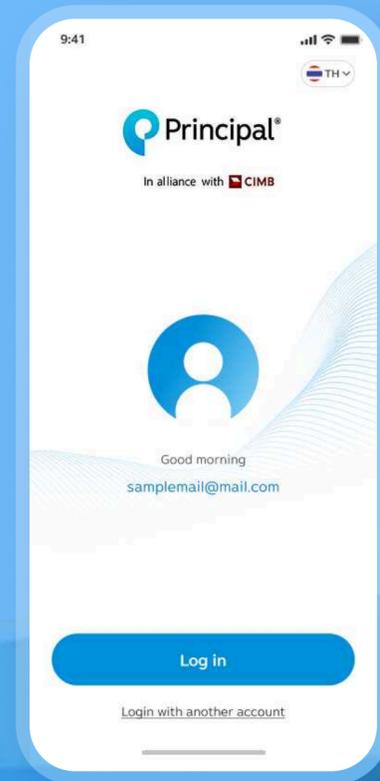
14. Set up your Face/Fingerprint settings for easier access in the future.



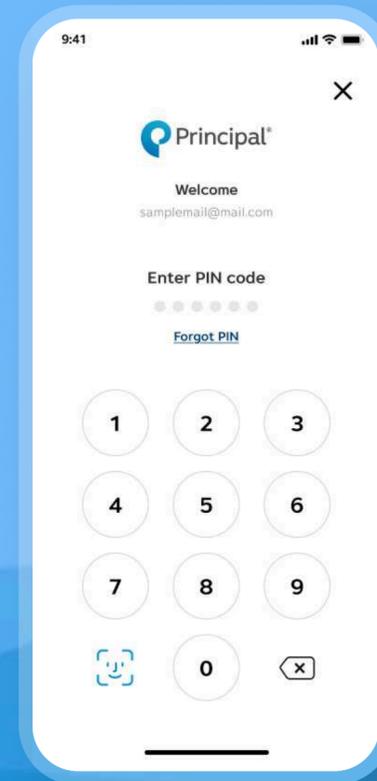
15. Go to "Home" page.

Open Mutual Fund Account

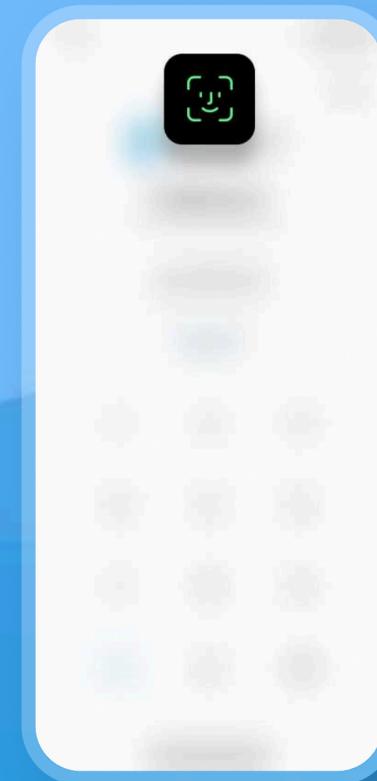
Open Mutual Fund Account



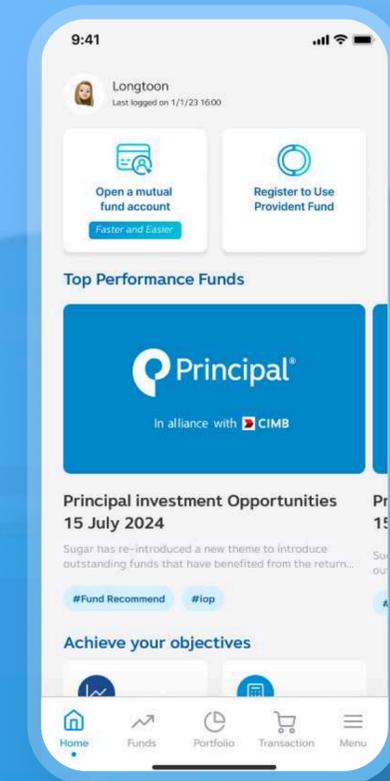
1. You can log in with your account or use another account.



2. If you haven't set up Face ID or fingerprint login, enter your PIN Code to continue.

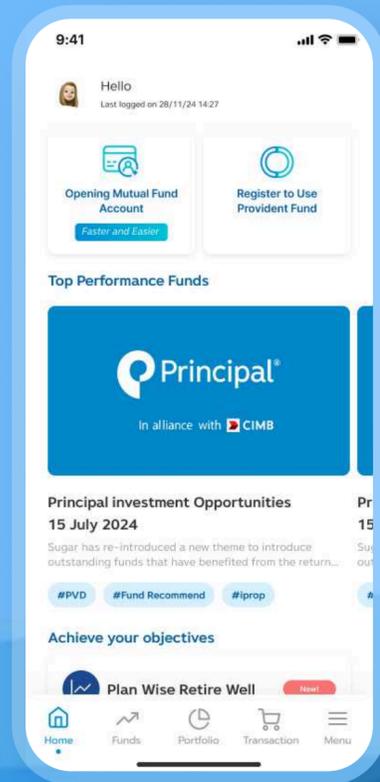


3. If Face ID or fingerprint login is set up, the system will log you in automatically.

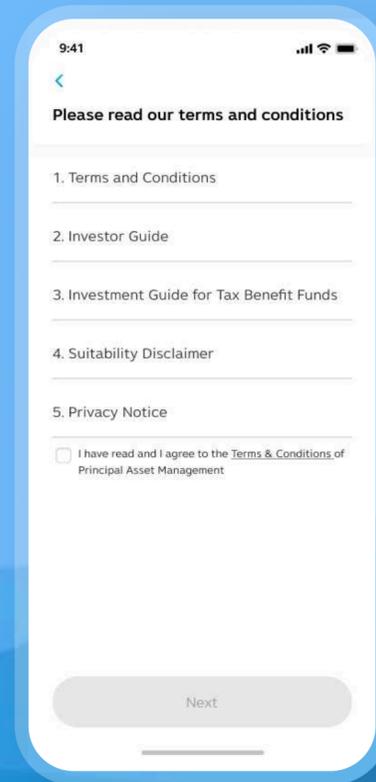


4. Go to "Home" page.

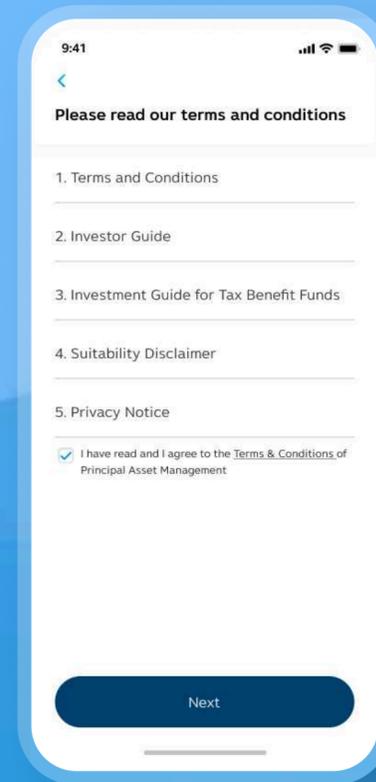
Open Mutual Fund Account



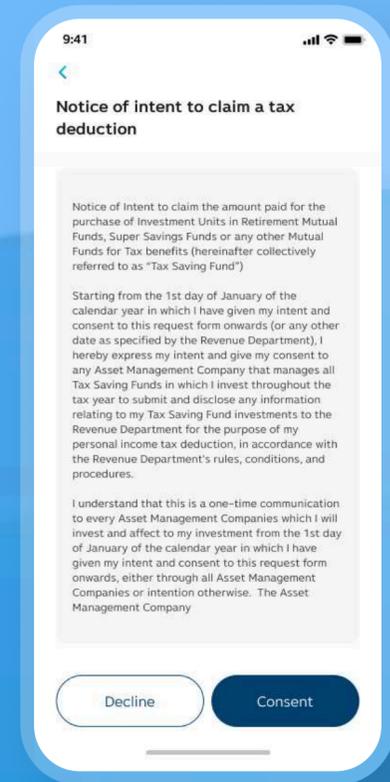
5. Click Opening Mutual Fund Account.



6. Read the terms and conditions.



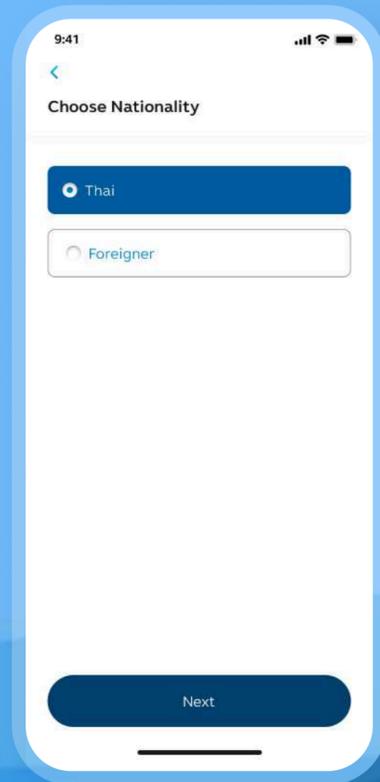
7. Accept all terms and conditions.



8. Read the “Notice of intent to claim a tax deduction” and provide consent information to continue.

Open Mutual Fund Account

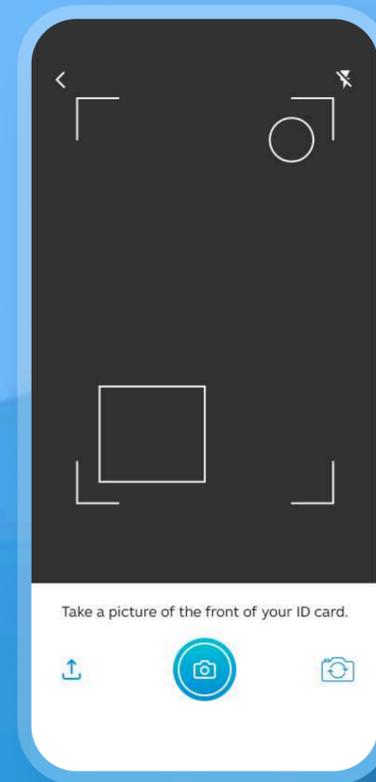
Thai Nationality



9. Select Thai nationality.



10. Details for taking a photo of your ID card. Click the "Next" button.



11. Take a picture of the front of your ID card.



12. Confirm your ID Card photo, click "Save".

Open Mutual Fund Account

Thai Nationality

9:41

Enter your name and date of birth

Name in Thai*

Surname in Thai*

Date of Birth*

Next

13. Enter your name and date of birth.

9:41

Enter your name and date of birth

Name in Thai*
สมชาย

Surname in Thai*
ประจักษ์

Date of Birth*
29 February 2000

Next

14. Click “Next”

9:41

Enter your ID Card

ID Card Number*

Laser Code*

Please enter your Laser Code and check the validity of your ID Card number once again.

Next

15. Enter your ID Card, click “Next”

9:41

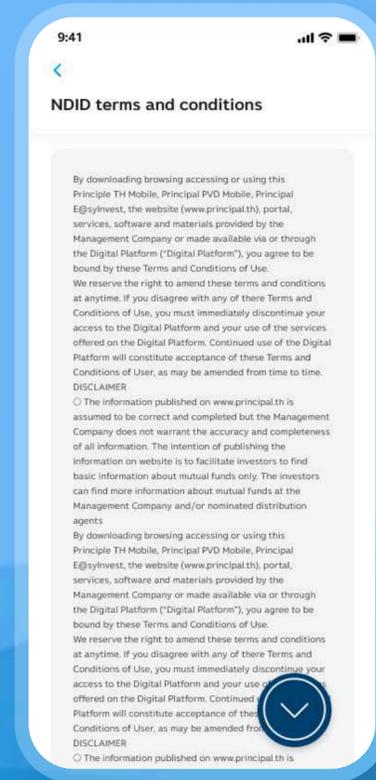
Select an Identity Verification Method

ndid National Digital ID (NDID)
Digital Identity for All

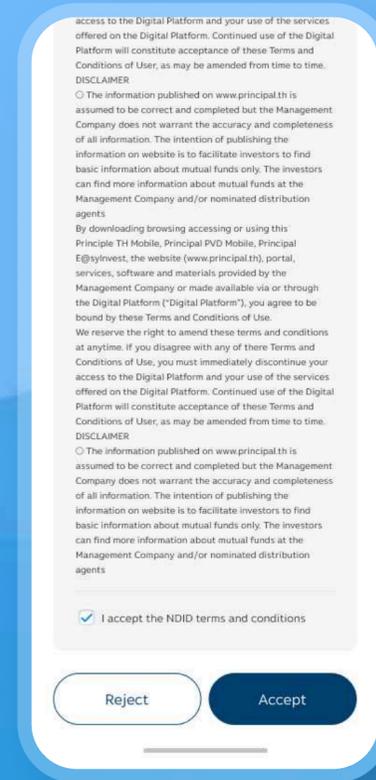
7-Eleven

16. Select your preferred identity verification method.

Open Mutual Fund Account



17. Read the National Digital ID (NDID) terms and conditions.



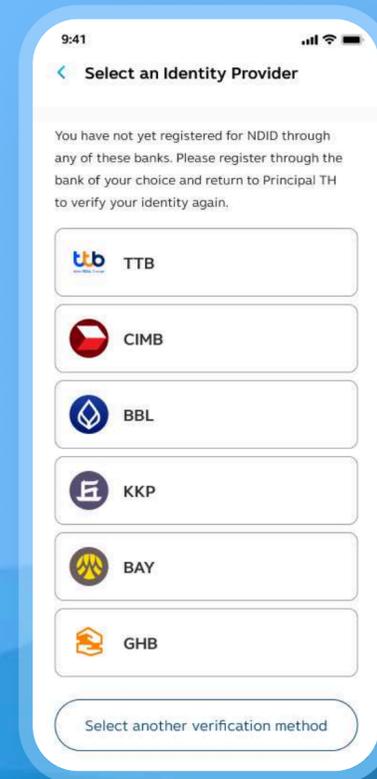
18. Accept all terms and conditions.

Open Mutual Fund Account

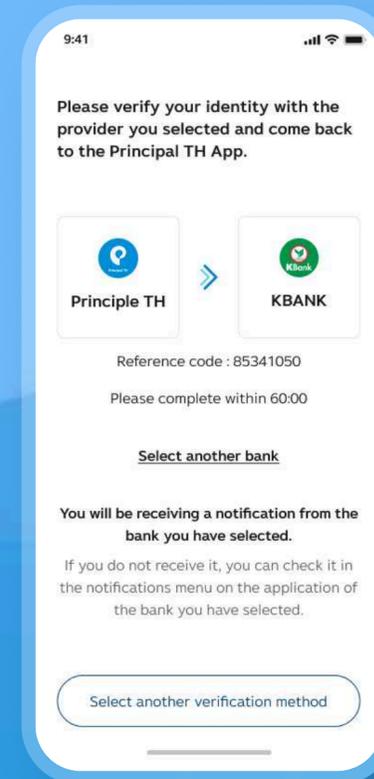
Identity verification method (NDID)



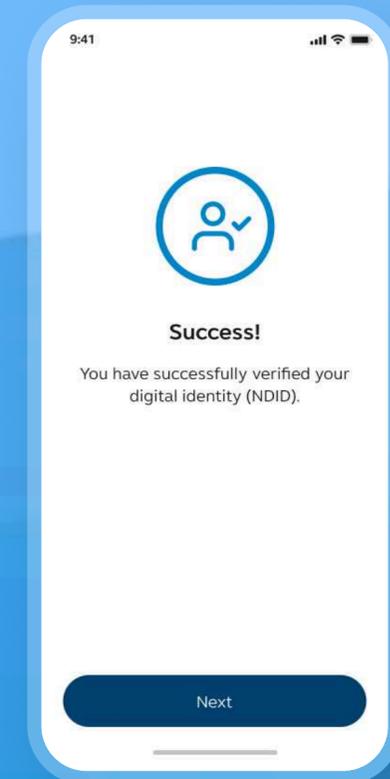
19. Choose your preferred Identity Provider.



20. You may select another bank; however, NDID registration must be completed with the chosen bank before returning to verify your identity on Principal TH.



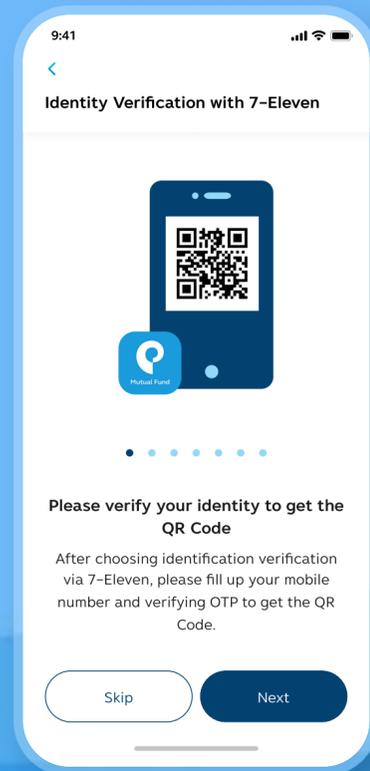
21. Complete the identity verification in the Identity Provider's app. Then, return to Principal TH.



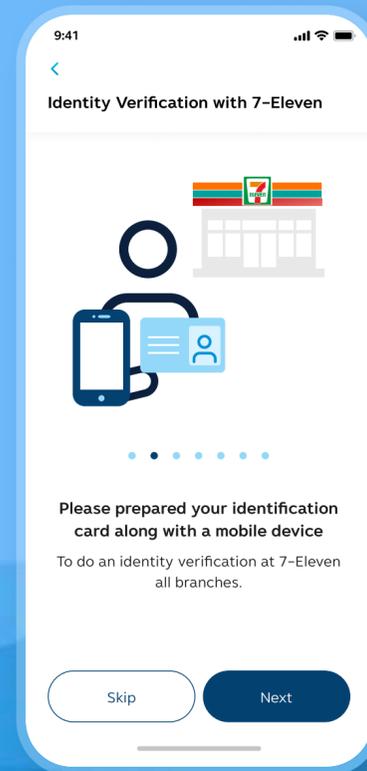
22. You have verified your digital identity. Click "Next" to continue.

Open Mutual Fund Account

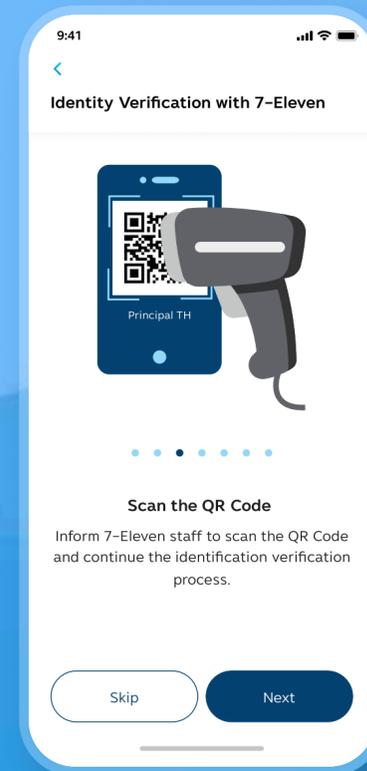
Identity verification method (7-Eleven)



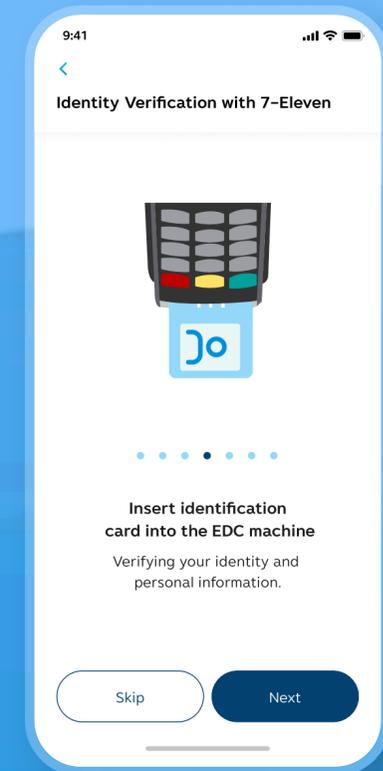
23.1 Provide details when selecting 7-Eleven as your identity verification service provider.



23.2 Prepare your identification card along with a mobile device.



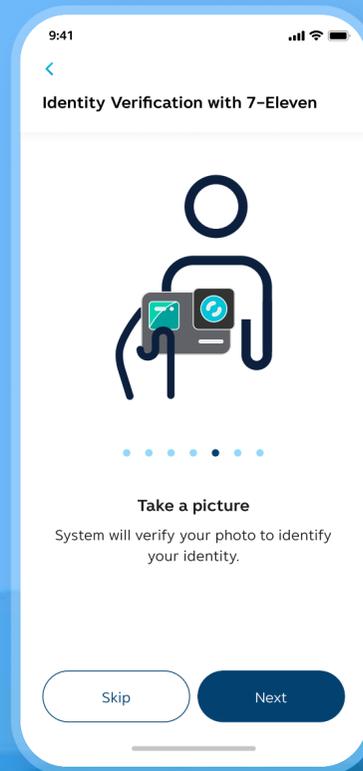
23.3 Scan the QR Code.



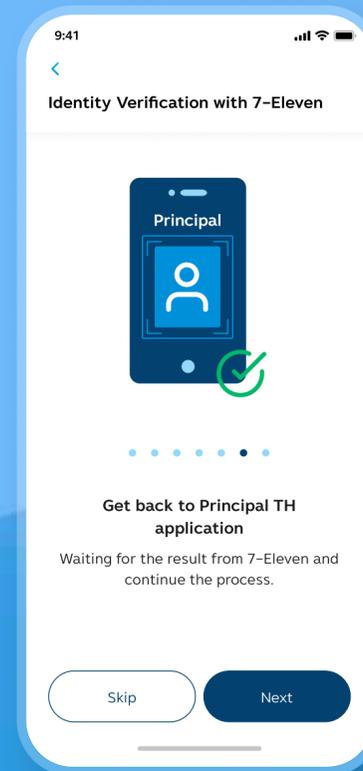
23.4 Insert identification card into the EDC machine.

Open Mutual Fund Account

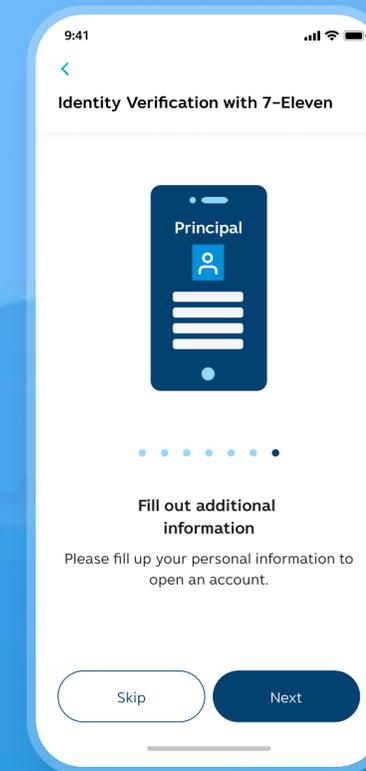
Identity verification method (7-Eleven)



23.5 Take a photo for identity verification.



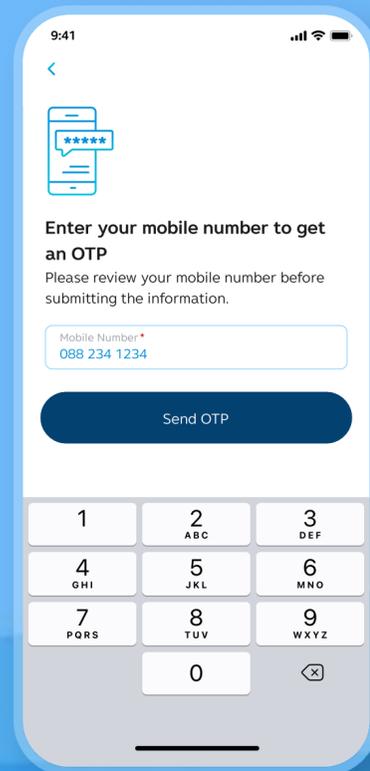
23.6 Return to the Principal TH App and wait for identity verification results from the service provider to proceed.



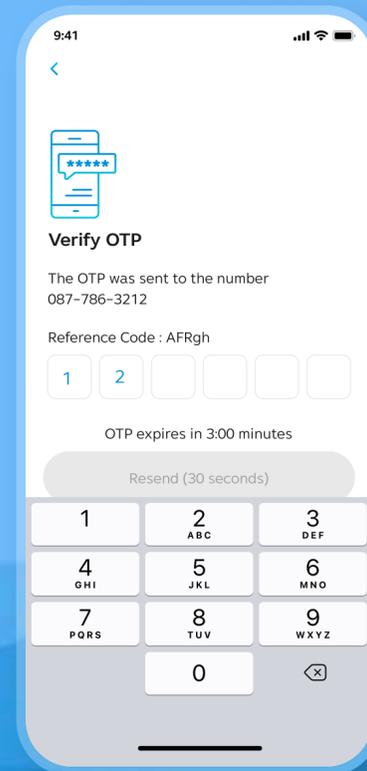
23.7 Enter additional information to verify your account.

Open Mutual Fund Account

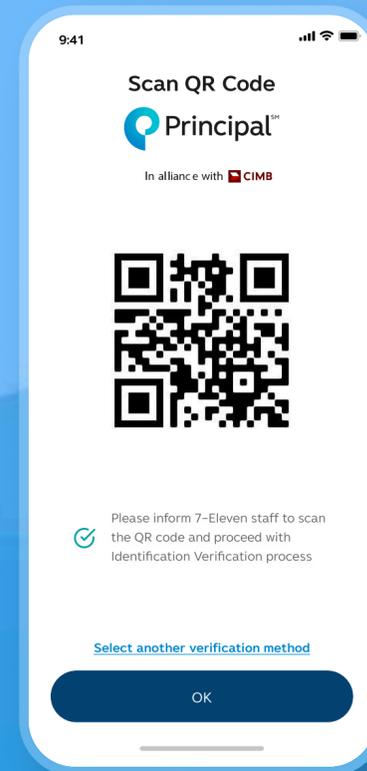
Identity verification method (7-Eleven)



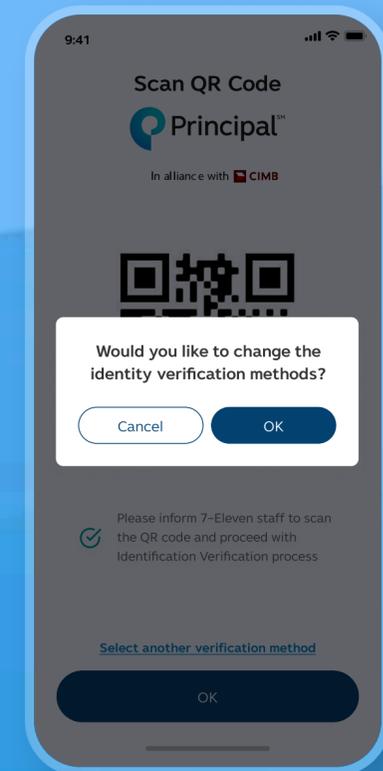
24. Enter your phone number to request an OTP.



25. Verify OTP.



26. Once the OTP is verified, you will receive a QR code to complete identity verification at 7-Eleven.



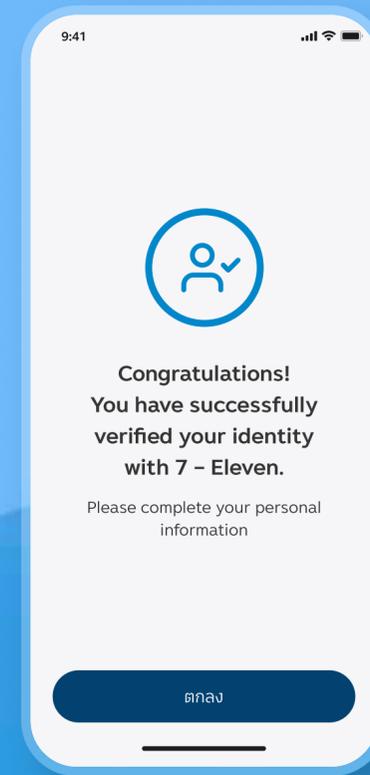
27. You can choose a different identity verification method by clicking "OK".

Open Mutual Fund Account

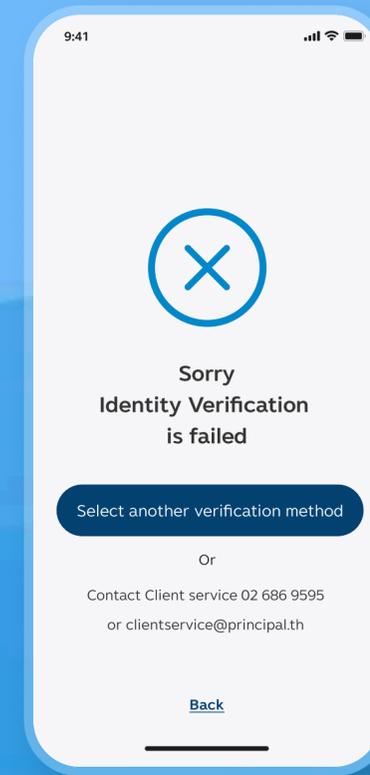
Identity verification method (7-Eleven)



28. You can verify your identity at any 7-Eleven branch.



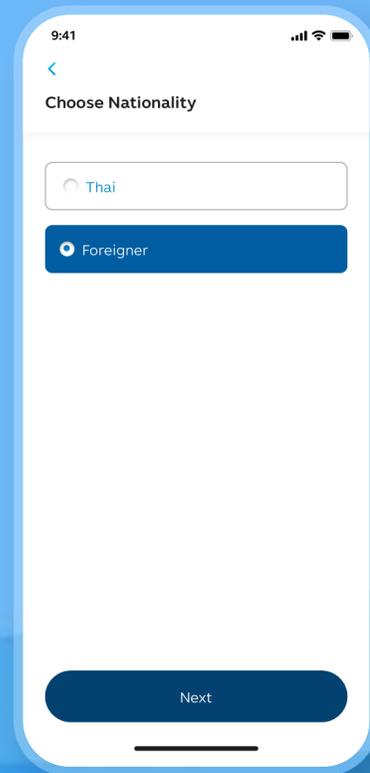
29. Identity verification through 7-Eleven is complete. Press "Ok" to proceed.



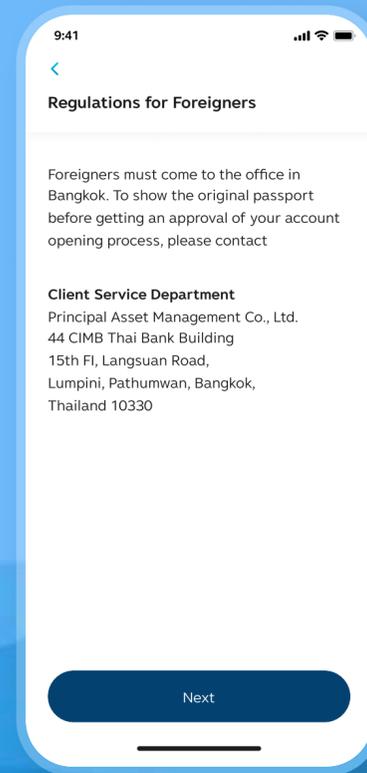
30. If identity verification through 7-Eleven is unsuccessful, you can choose to open a new account or contact Client Service.

Open Mutual Fund Account

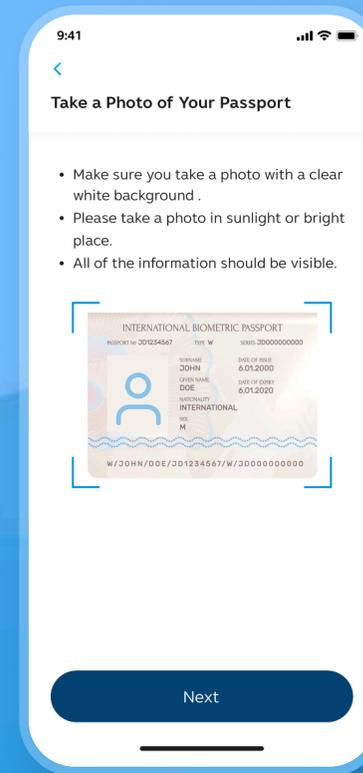
Other Nationality



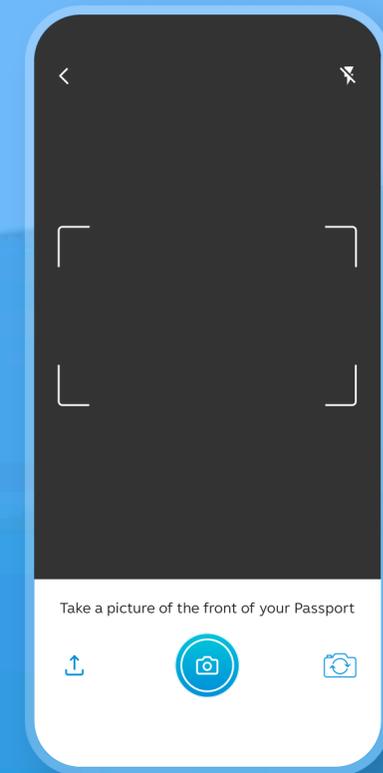
31. Select “Foreigner”.



32. Details on regulations for foreigners.
Click “Next” to continue.



33. Passport photo guidelines.
Click “Next” to continue.



34. Take a picture of
the front of your Passport.

Open Mutual Fund Account

Other Nationality



35. Confirm your ID Card photo click "Save".



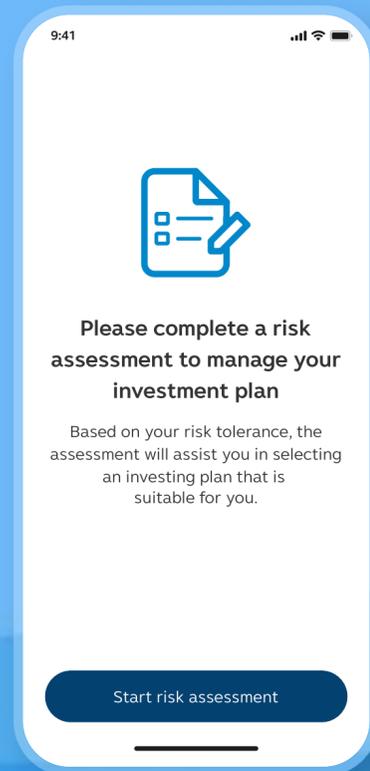
36. Enter your name and date of birth, click "Next".



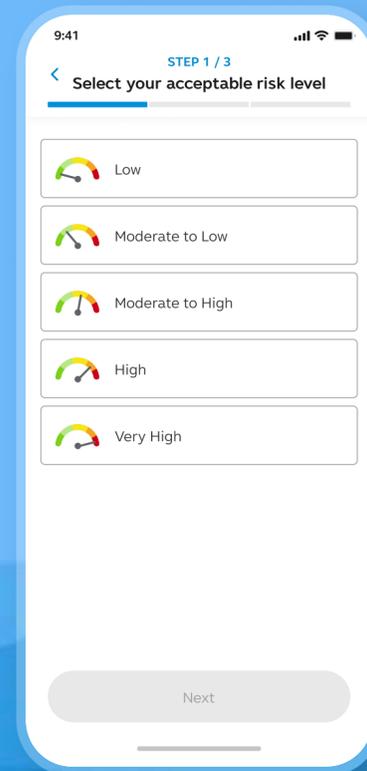
37. Enter your passport number, click "Next".

Open Mutual Fund Account

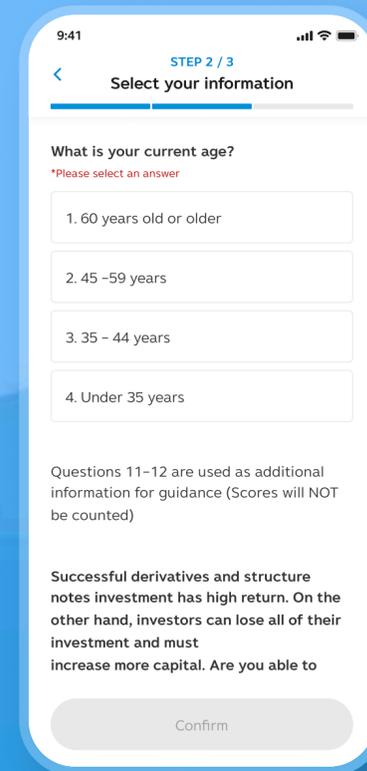
Risk assessment



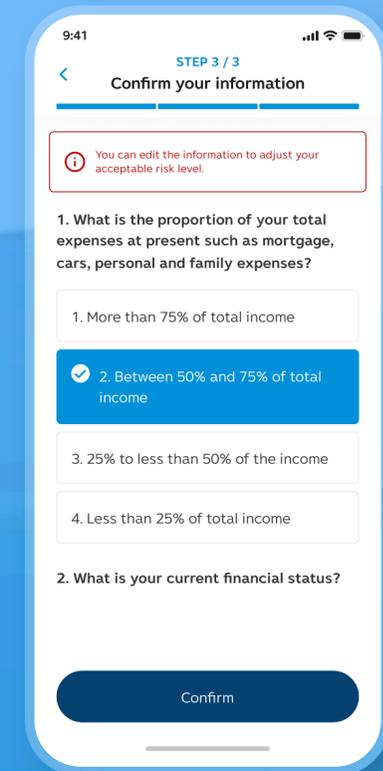
38. Click “Start risk assessment”.



39. Select your acceptable risk level.



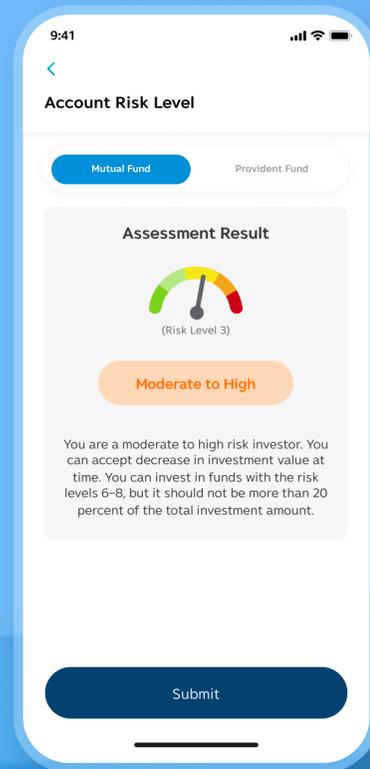
40. Answer all questions and click “Confirm” to continue.



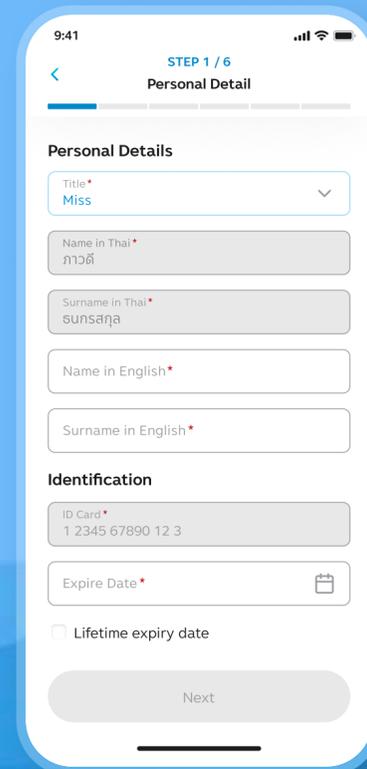
41. Answer all questions and click “Confirm” to continue.

Open Mutual Fund Account

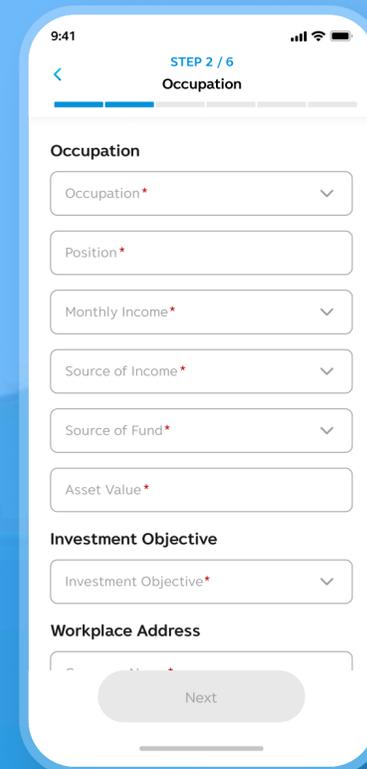
Fill in Personal Information



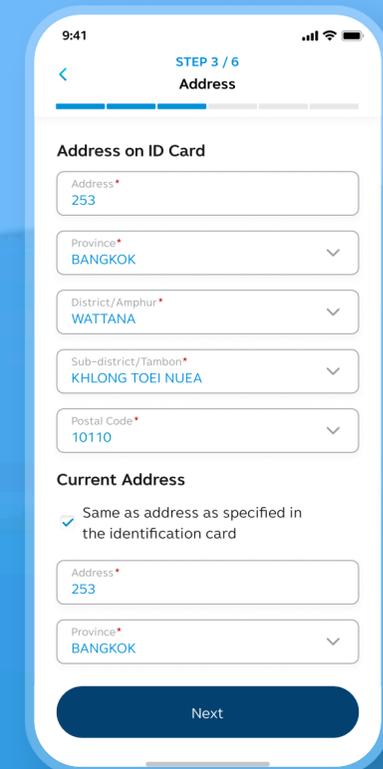
42. Review your assessment result and click “Submit” to continue (If you already have a PVD account, this step will be displayed immediately).



43. Fill in your personal information and click “Next” to continue.



44. Fill in occupation information and click “Next” to continue.



45. Fill in address information and click “Next” to continue.

Open Mutual Fund Account

Fill in Personal Information

46. Confirm that you are not a U.S. citizen. Click “Next” to continue.

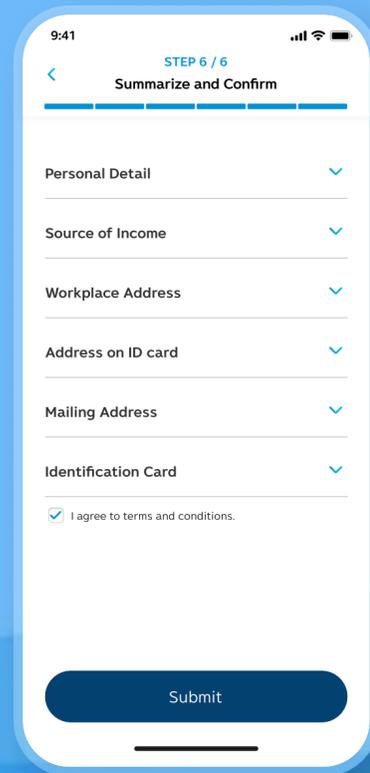
47. Complete the CRS Form and click “Next” to continue.

48. Read FATCA and CRS Terms and Conditions.

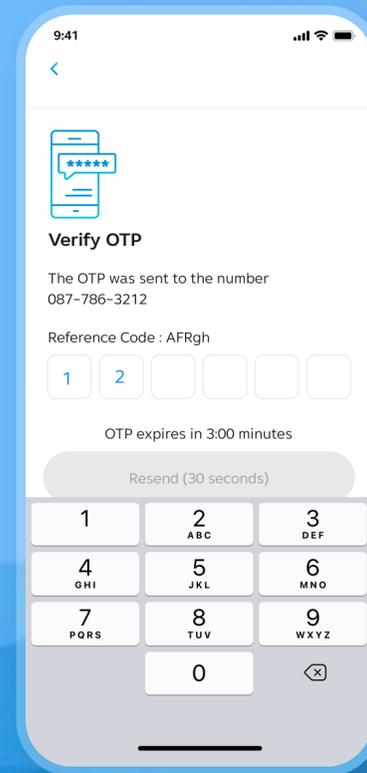
49. Accept all terms and conditions.

Open Mutual Fund Account

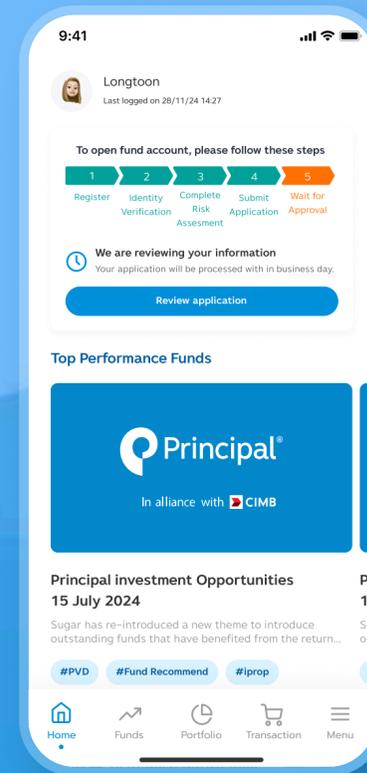
Submit application



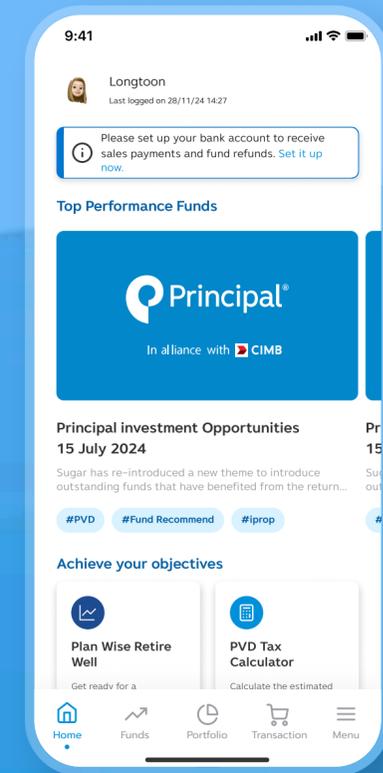
50. Review your application details, click the consent box, and click “Submit” to continue.



51. Verify OTP

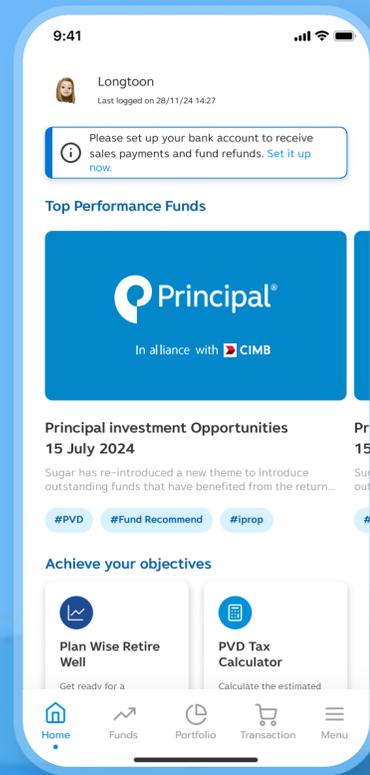


52. Return to the home page and wait for approval of the account opening.

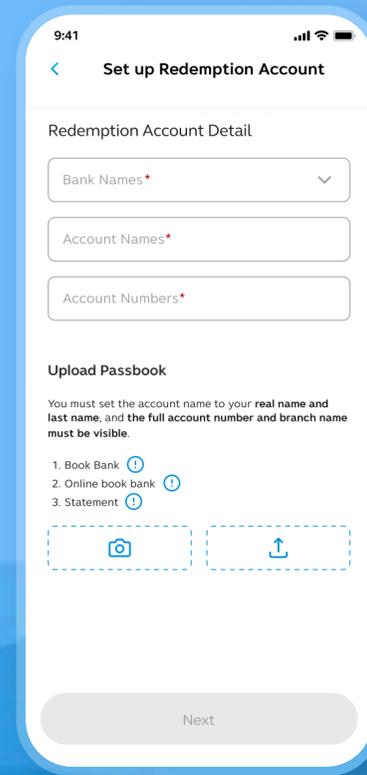


53. Once application is approved, please set up your redemption bank account.

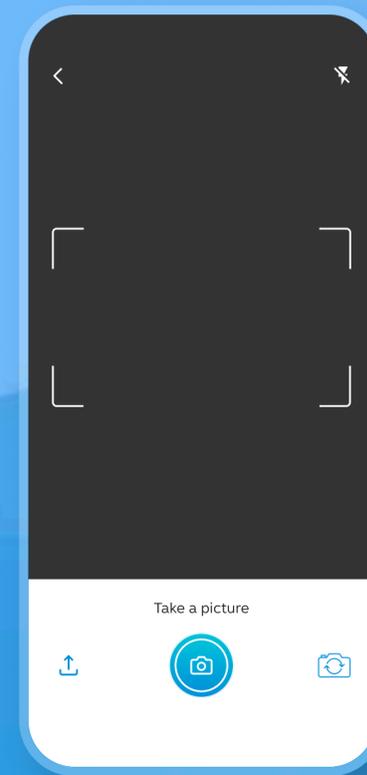
Set up Redemption Account



54. Click “Set it up now” to begin setting up bank account for receiving proceeds from mutual fund redemptions.



55. Enter the details of the redemption account.

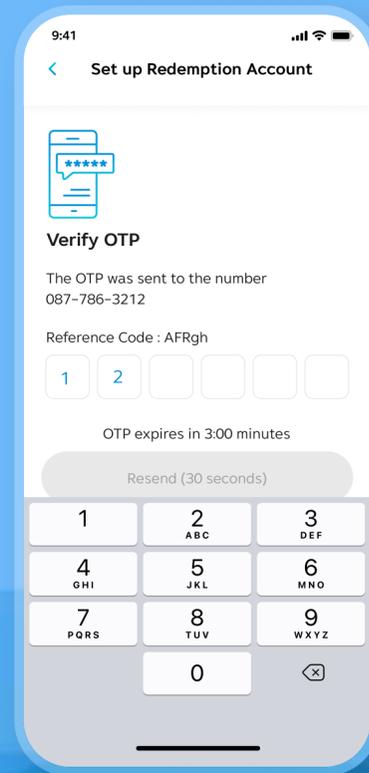


56. Take a picture of your bank book.

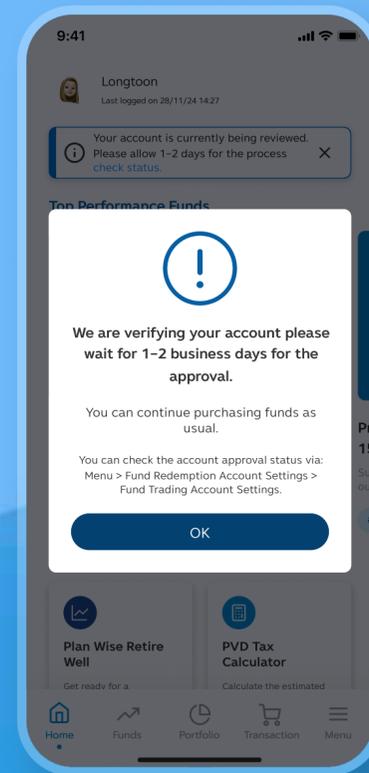


57. Review the information, then click “Next”.

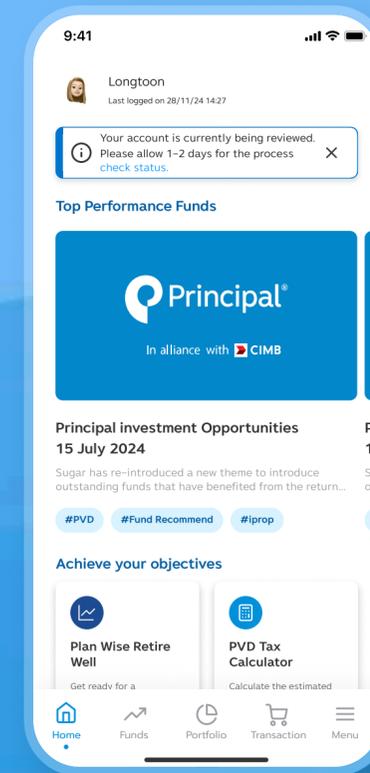
Set up Redemption Account



58. Verify OTP



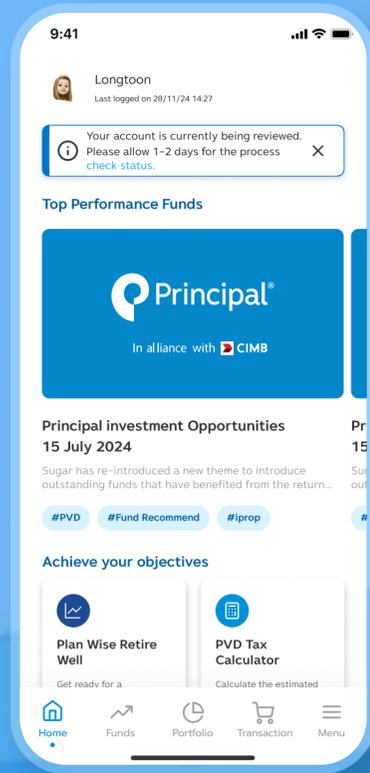
59. A pop-up will confirm that the process is complete. Please allow 1–2 days for account verification. Click “OK” to proceed.



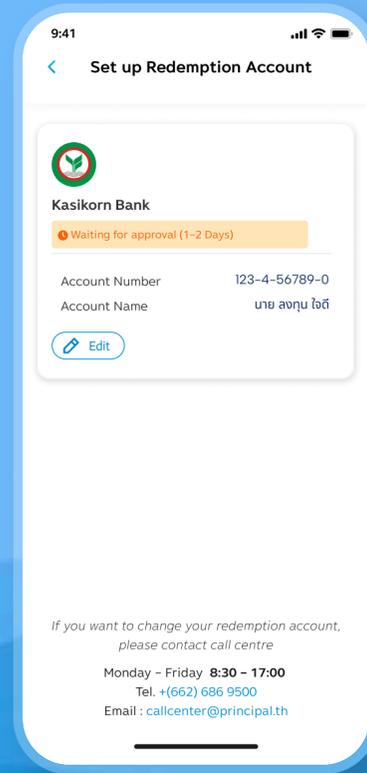
60. Return to the home screen. You can check the status click “check status”.

Set up Redemption Account

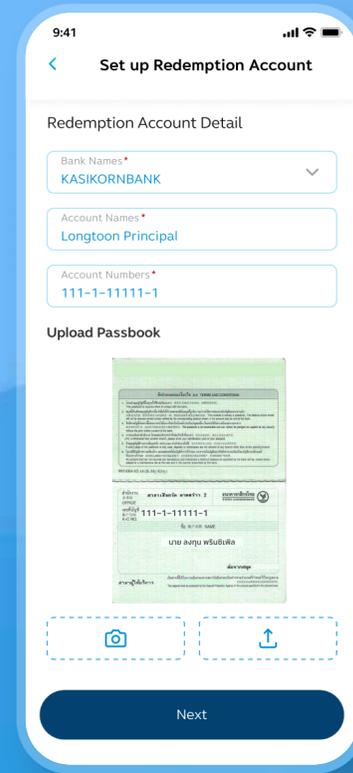
Pending status



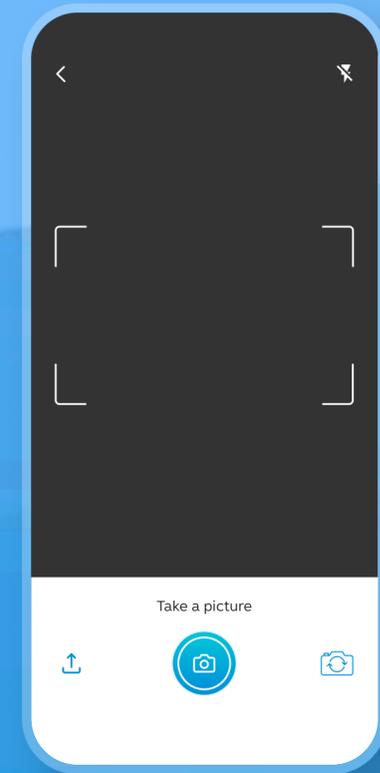
61. During “Pending” status, you can edit the redemption account. Click “check status”.



62. Edit account and bank details by clicking “Edit.”



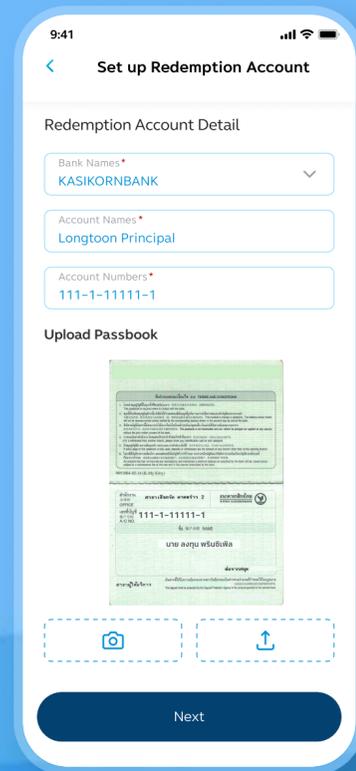
63. Edit the information.



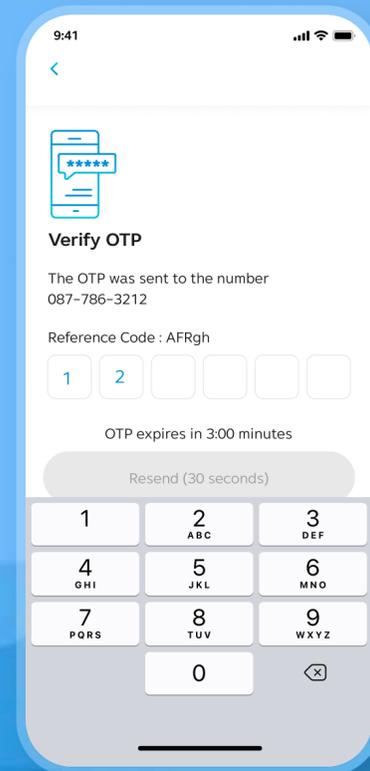
64. Take a picture of your bank book.

Set up Redemption Account

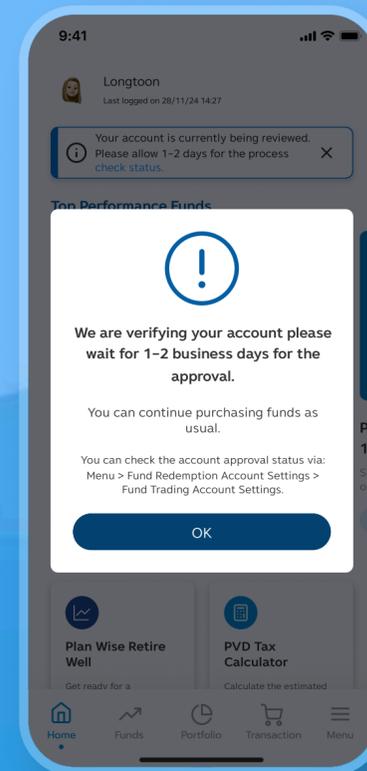
Pending status



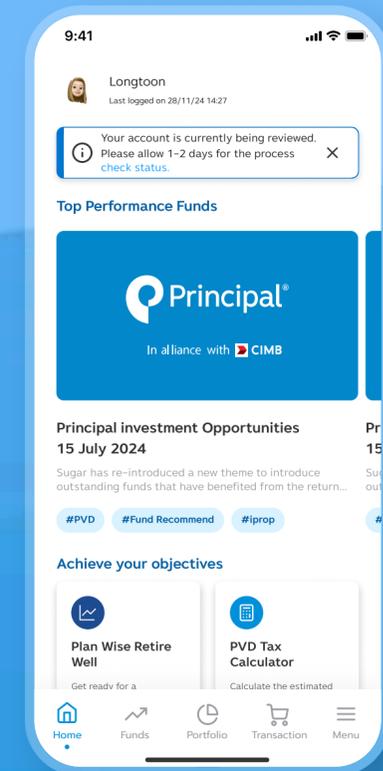
65. Check the information and click the "Next" button.



66. Verify OTP



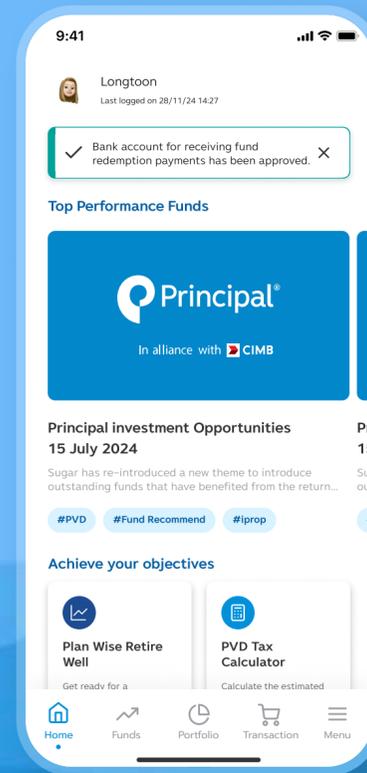
67. A pop-up will confirm that the process is complete. Please allow 1–2 days for account verification. Click “OK” to proceed.



68. Return to the home screen. You can check the status click “check status”.

Set up Redemption Account

Approved status



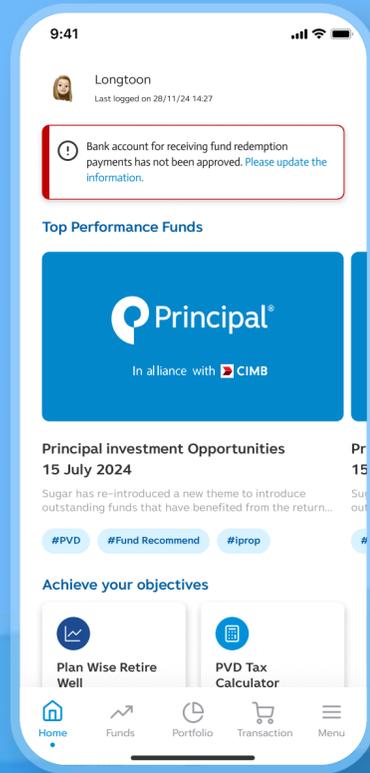
69. The "Approved" status means that the bank account for receiving fund redemption proceeds has been approved. You can close it by clicking on "X"



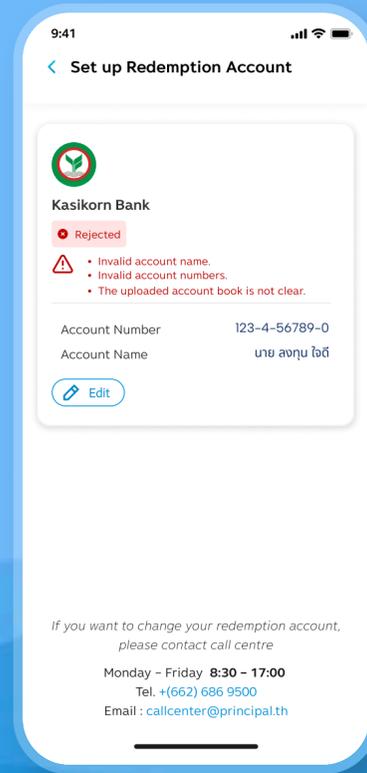
70. The status bar will disappear.

Set up Redemption Account

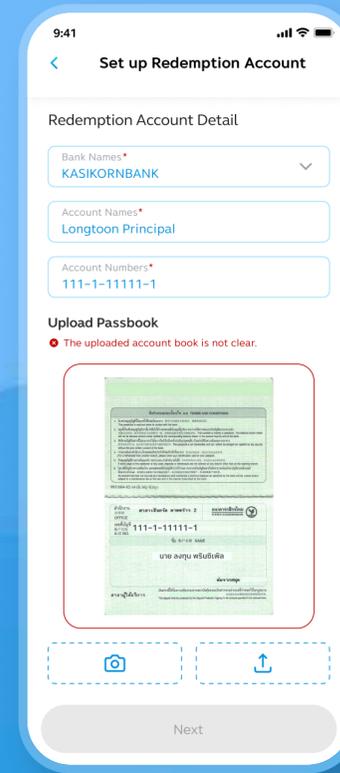
Rejected status



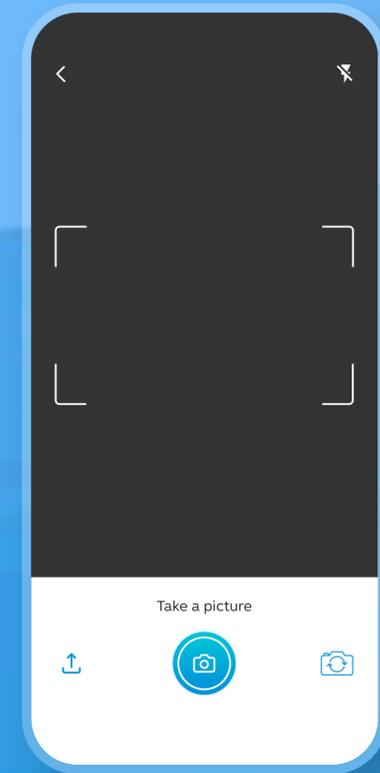
71. In the “Rejected” status, click “Please update the information” to edit and resubmit.



72. Display the reason for not approving. Click “Edit” to modify the information.



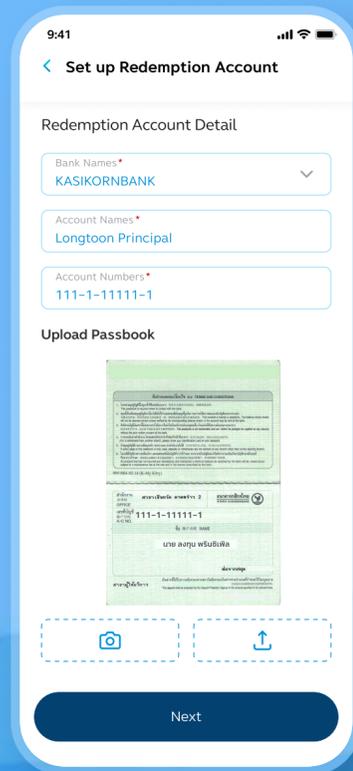
73. Edit the information.



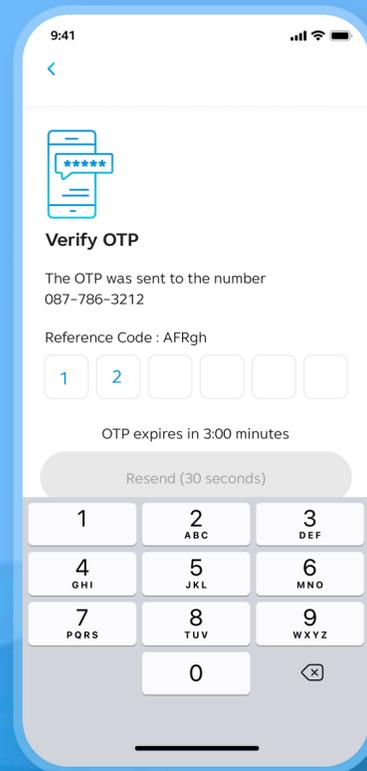
74. Take a picture of your bank book.

Set up Redemption Account

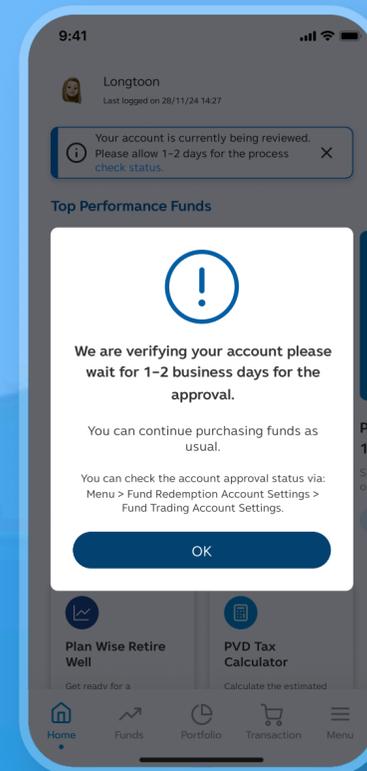
Rejected status



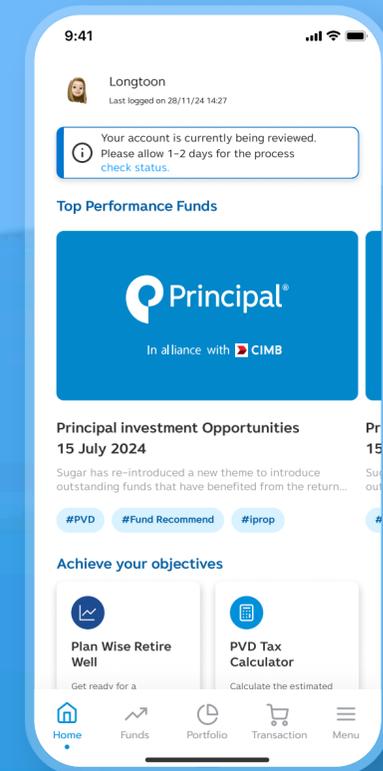
75. Check the information and click the "Next" button.



76. Verify OTP.



77. A pop-up will confirm that the process is complete. Please allow 1–2 days for account verification. Click “OK” to proceed.



78. Return to the home screen. You can check the status click “check status”.



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