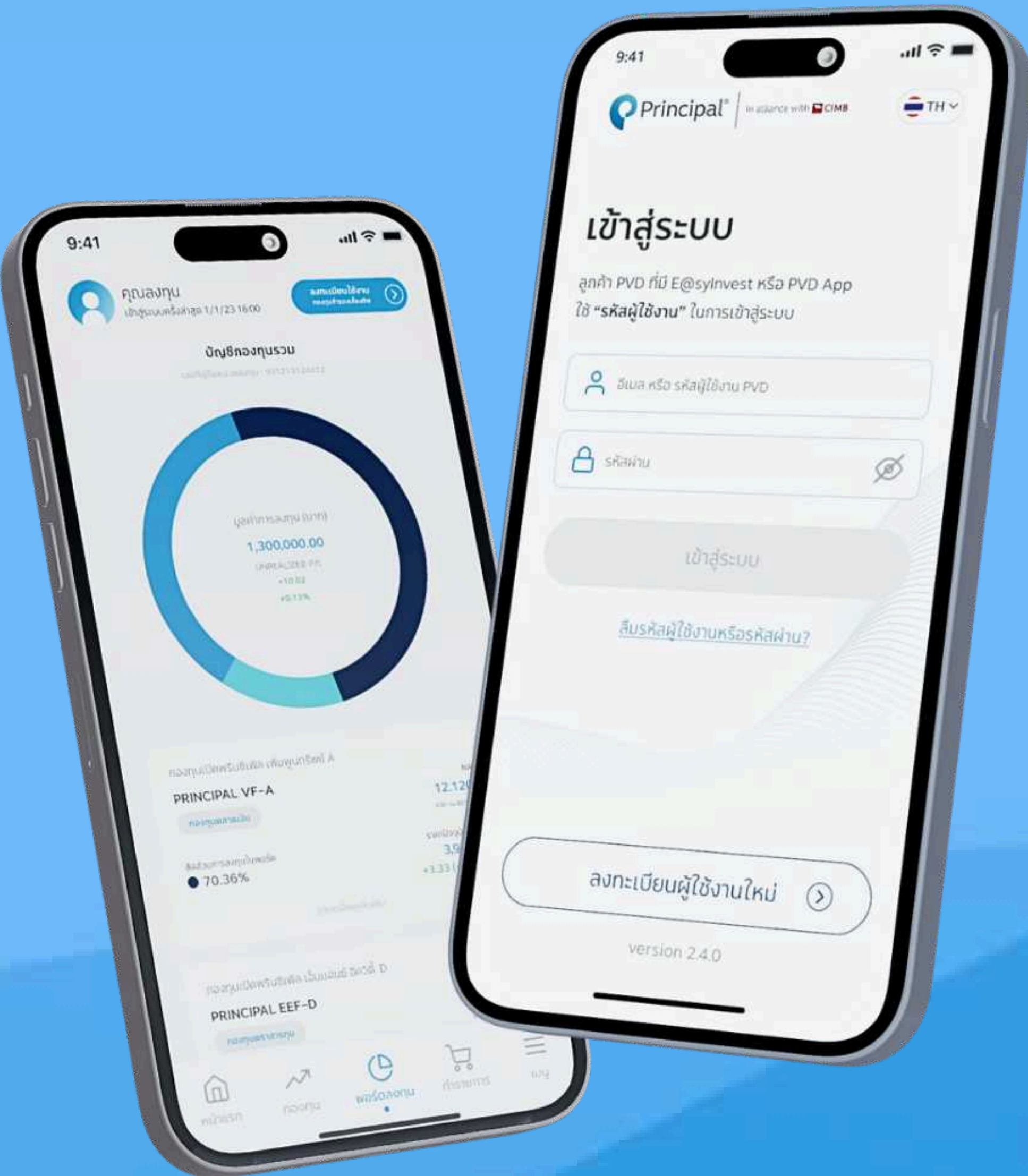




User Manual

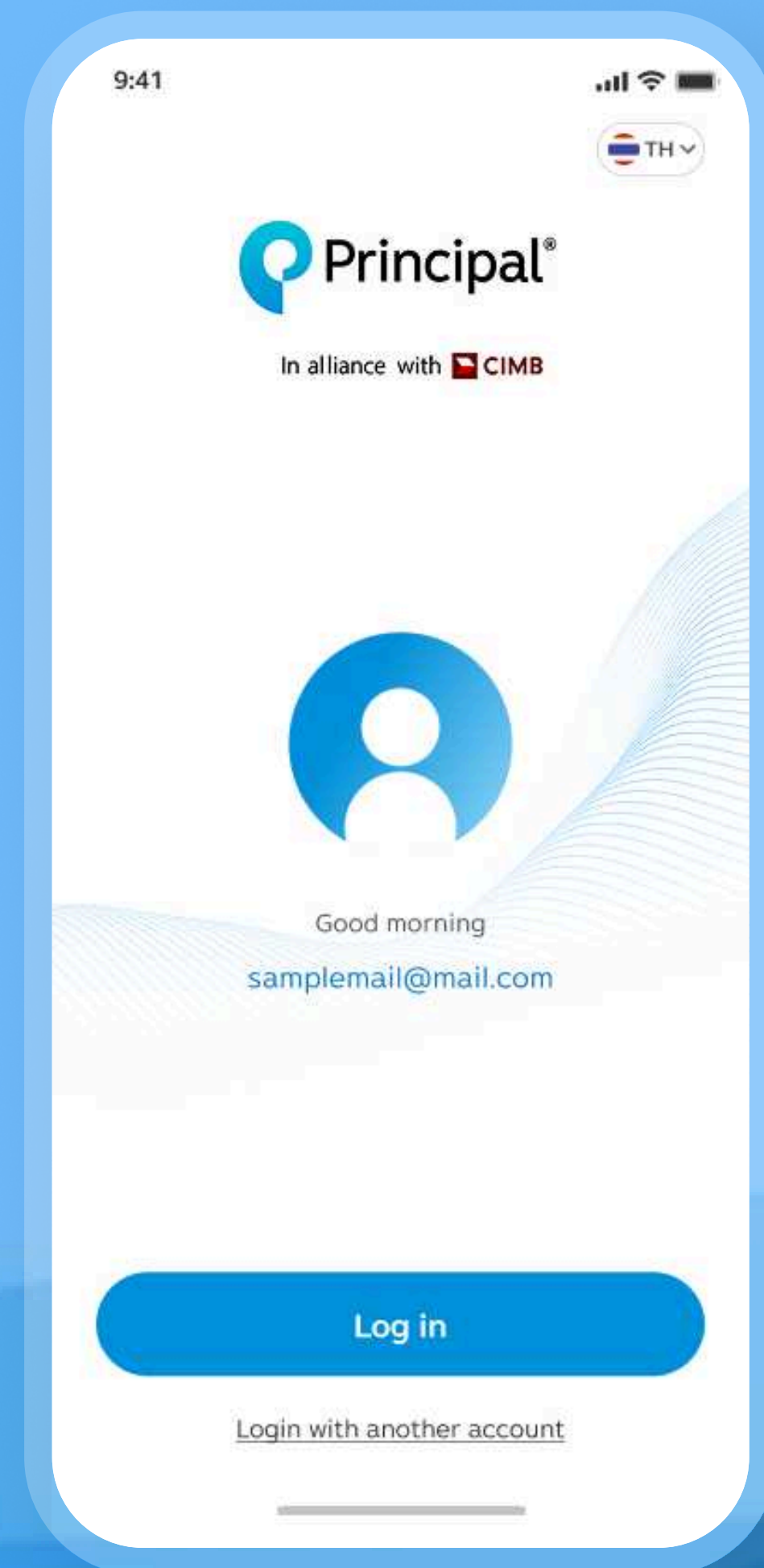


List of contents

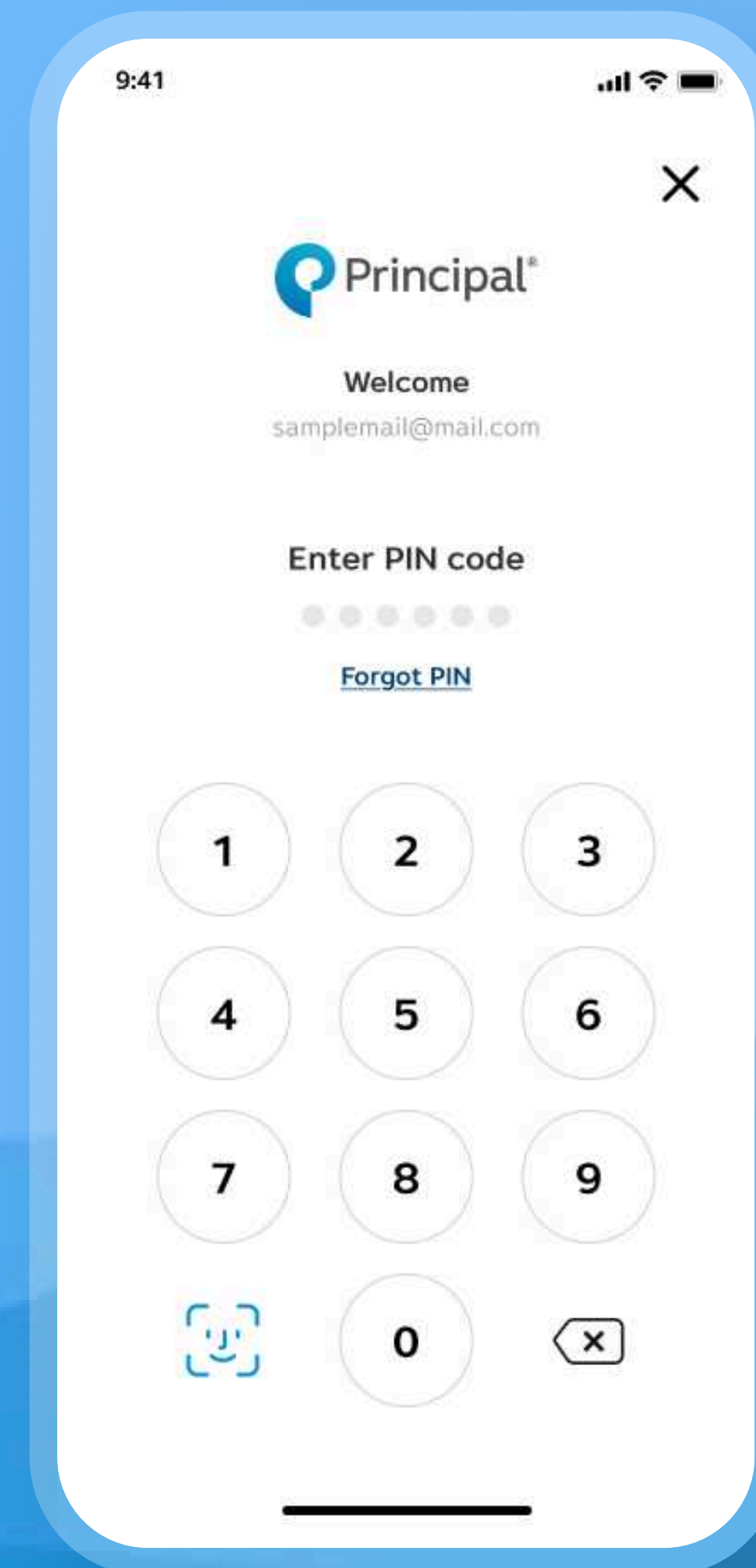
Specify Contribution Allocation	1
Switching within fund	7
Transfer between funds	11

Specify Contribution Allocation

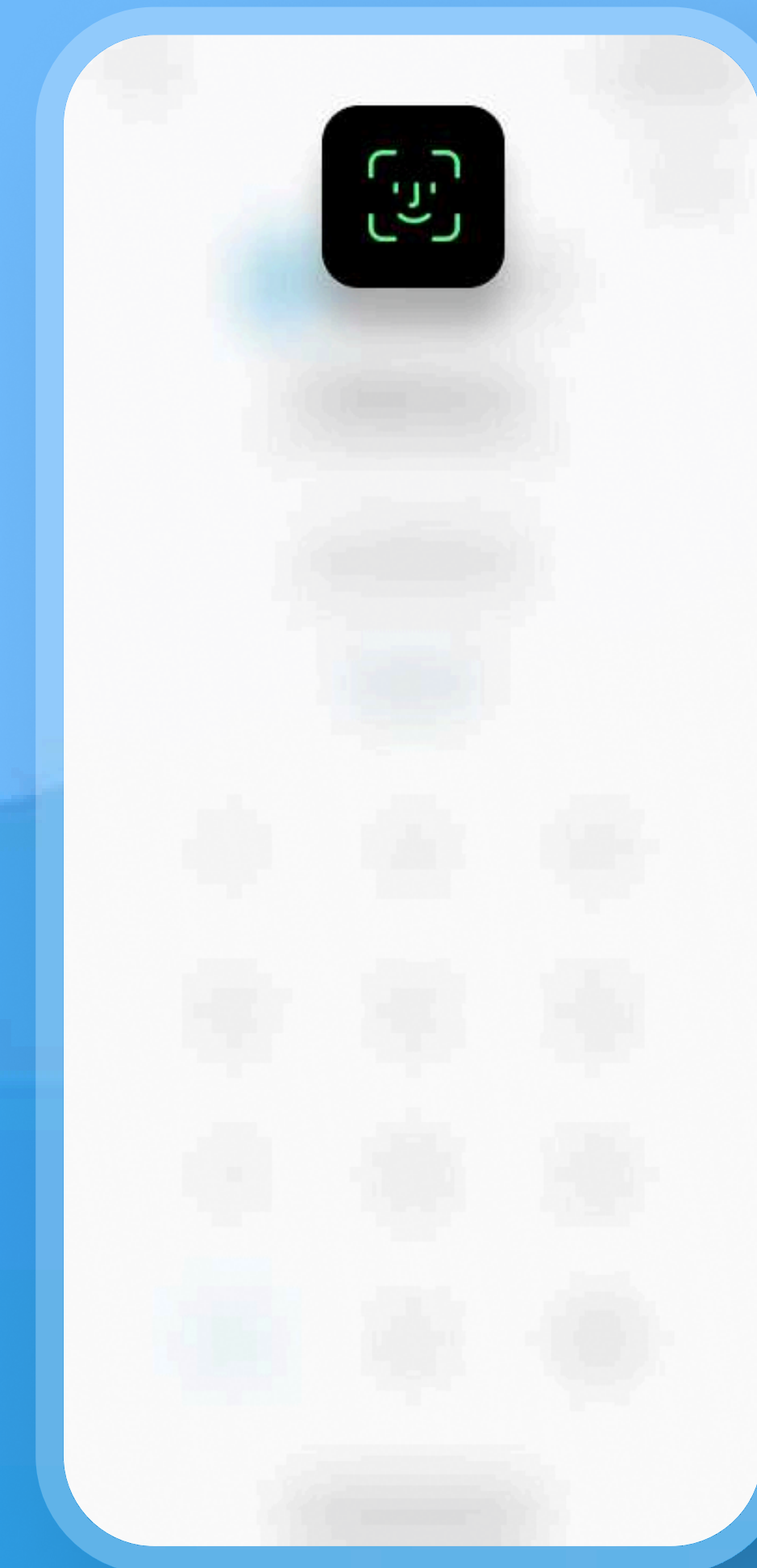
Specify Contribution Allocation



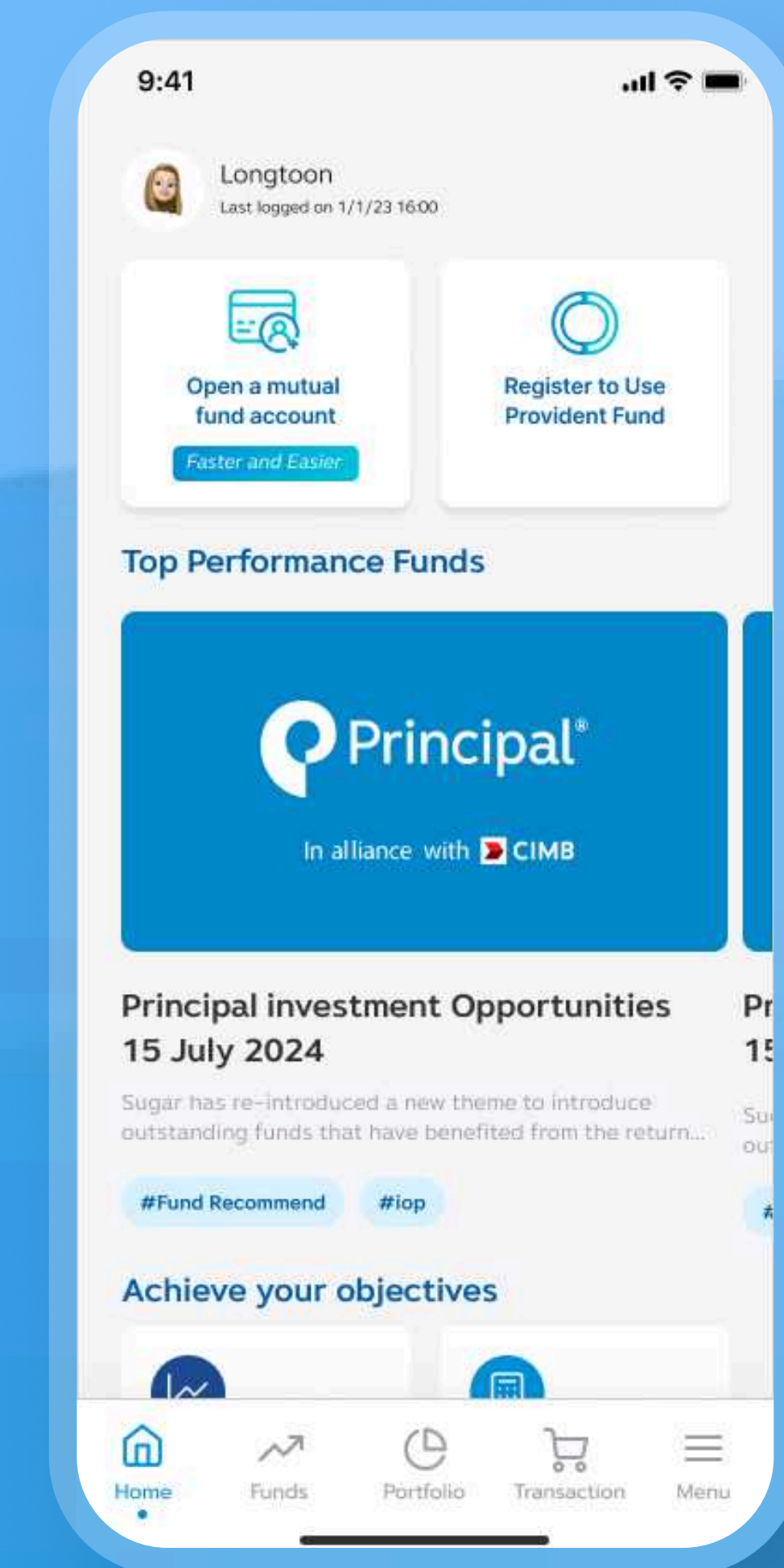
1. You can log in with your account or use another account.



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

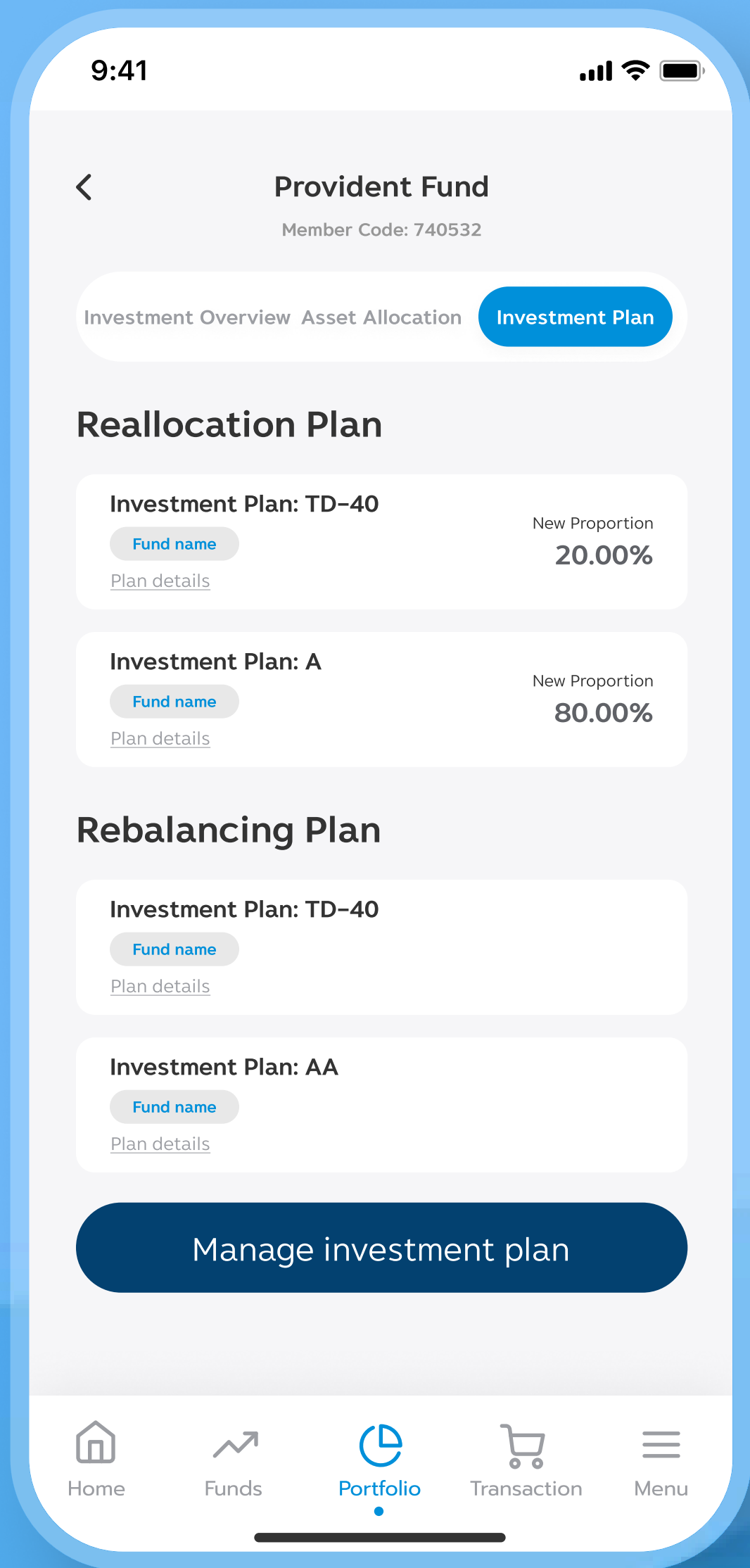


3. If Face ID or fingerprint login is set up, the system will log you in automatically.

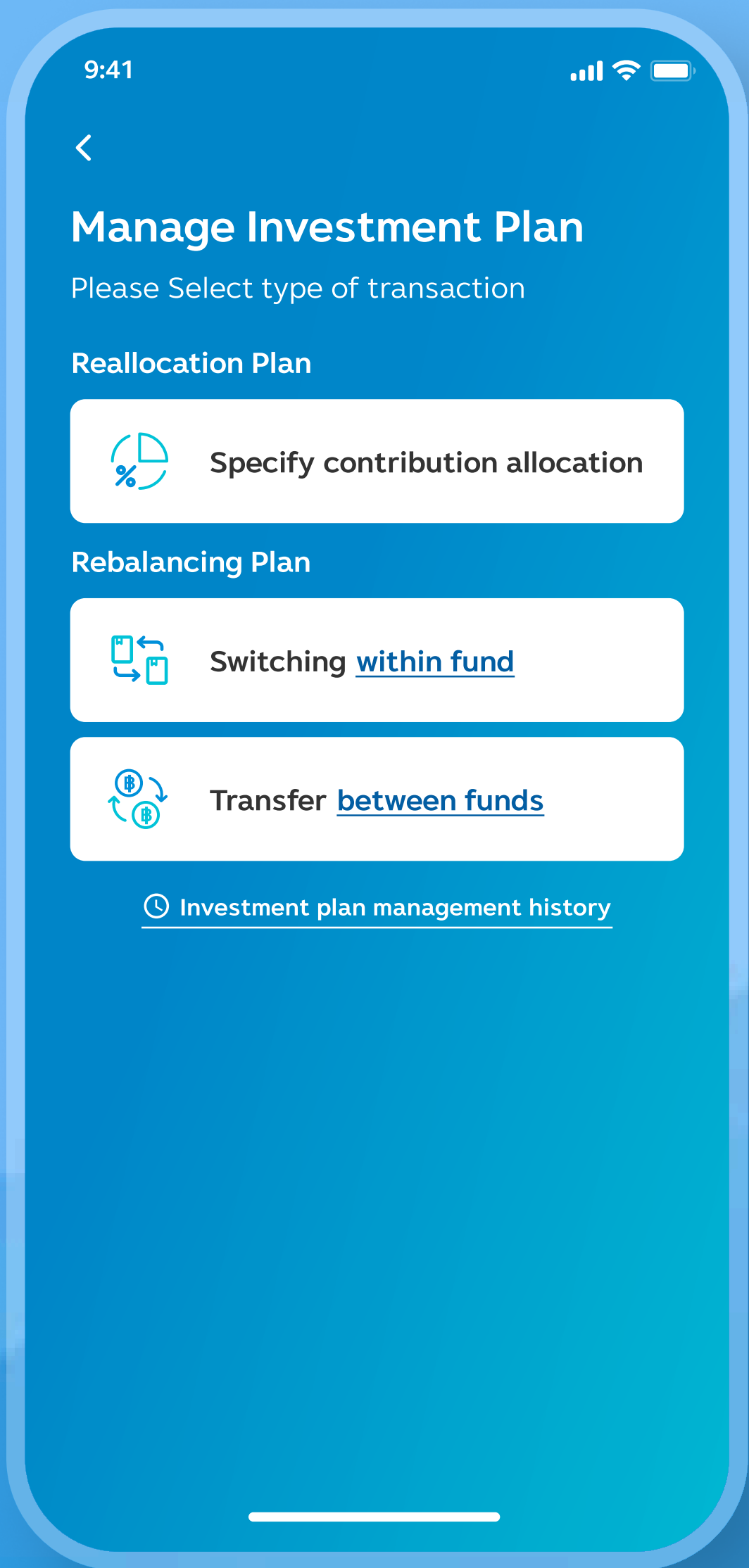


4. Go to "Home" page.

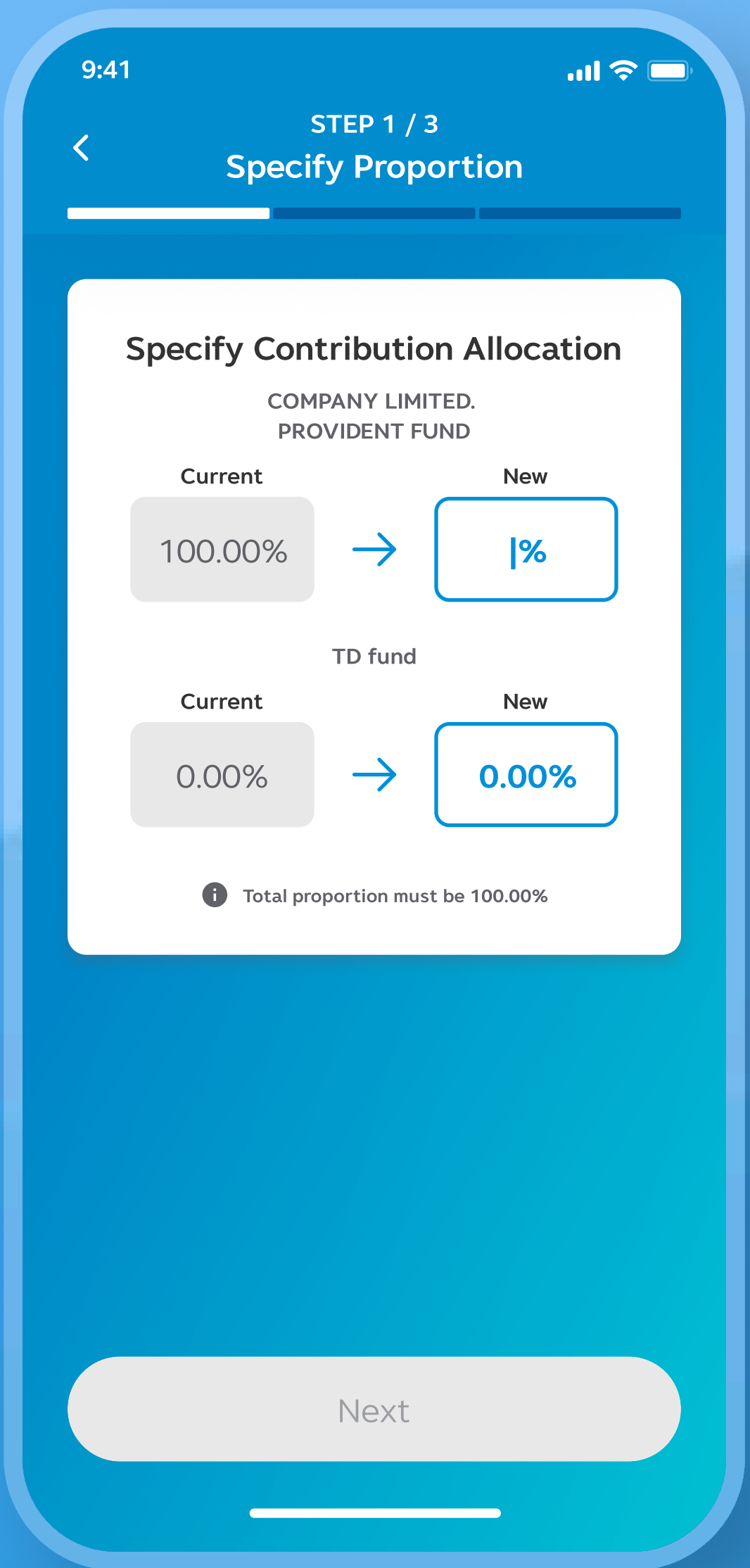
Specify Contribution Allocation



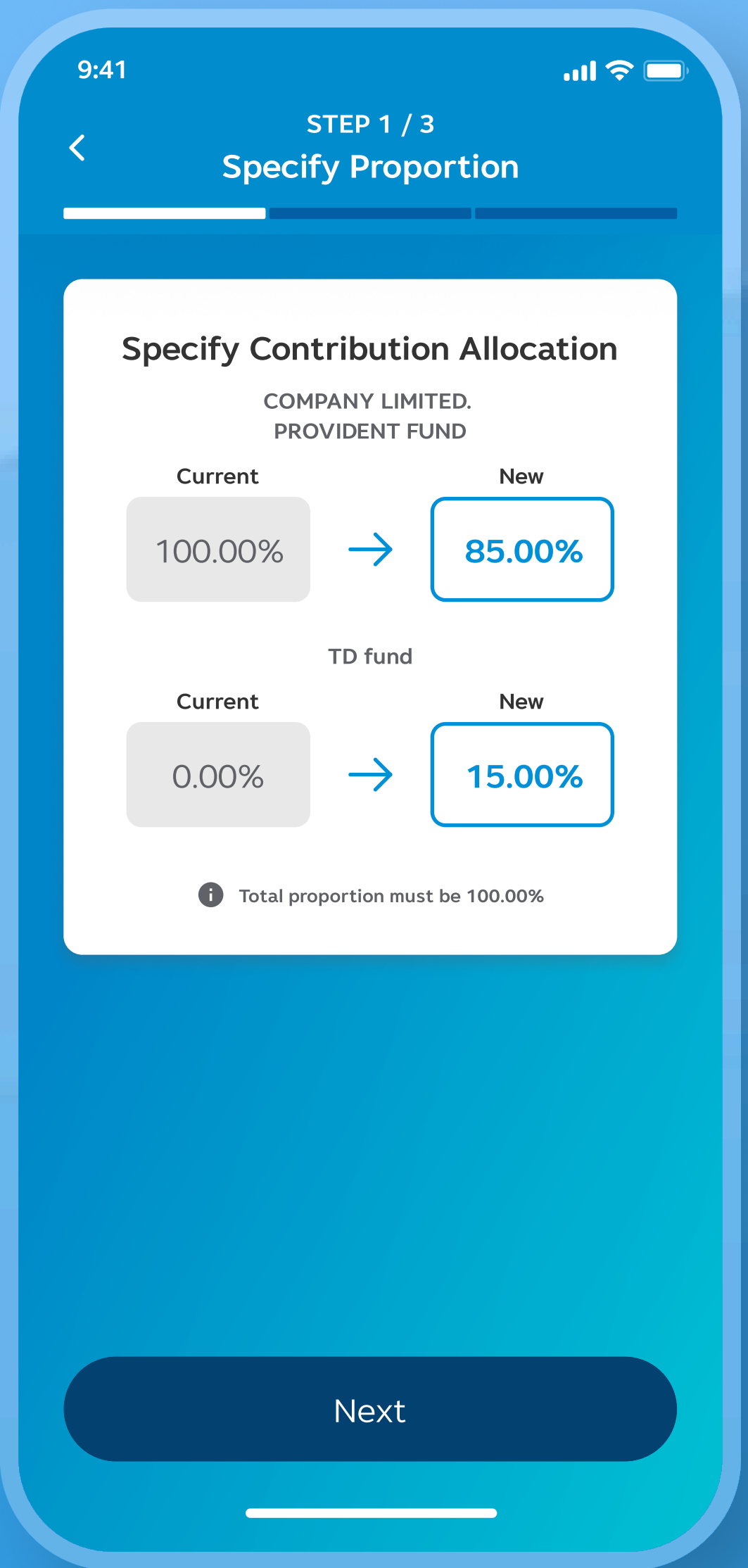
5. Click menu “Manage investment plan” and click “Manage investment plan”.



6. Click “Specify contribution allocation”.
The available menu depends on your company policy

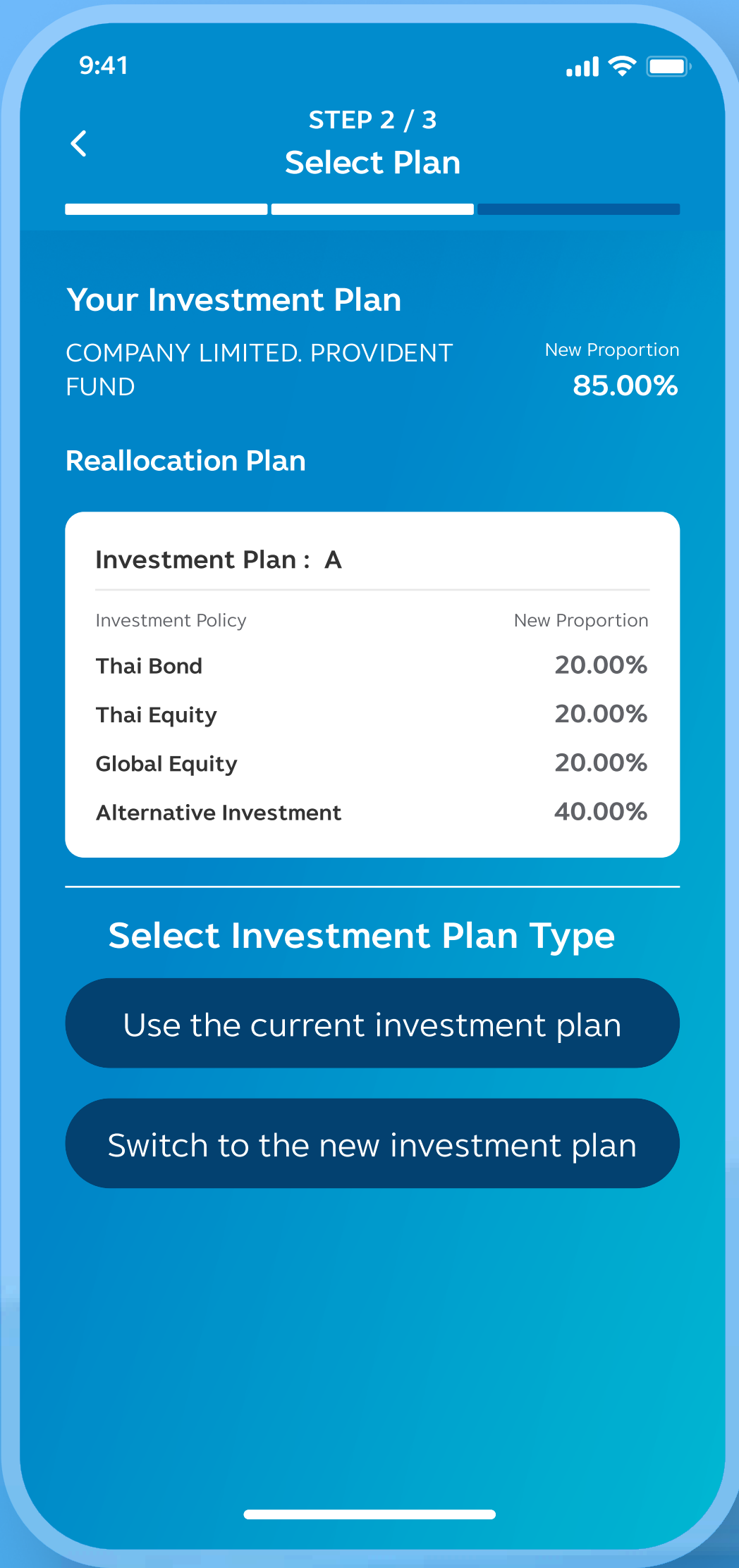


7. Fill in new contribution proportion.
The contribution proportion must be 100.00%

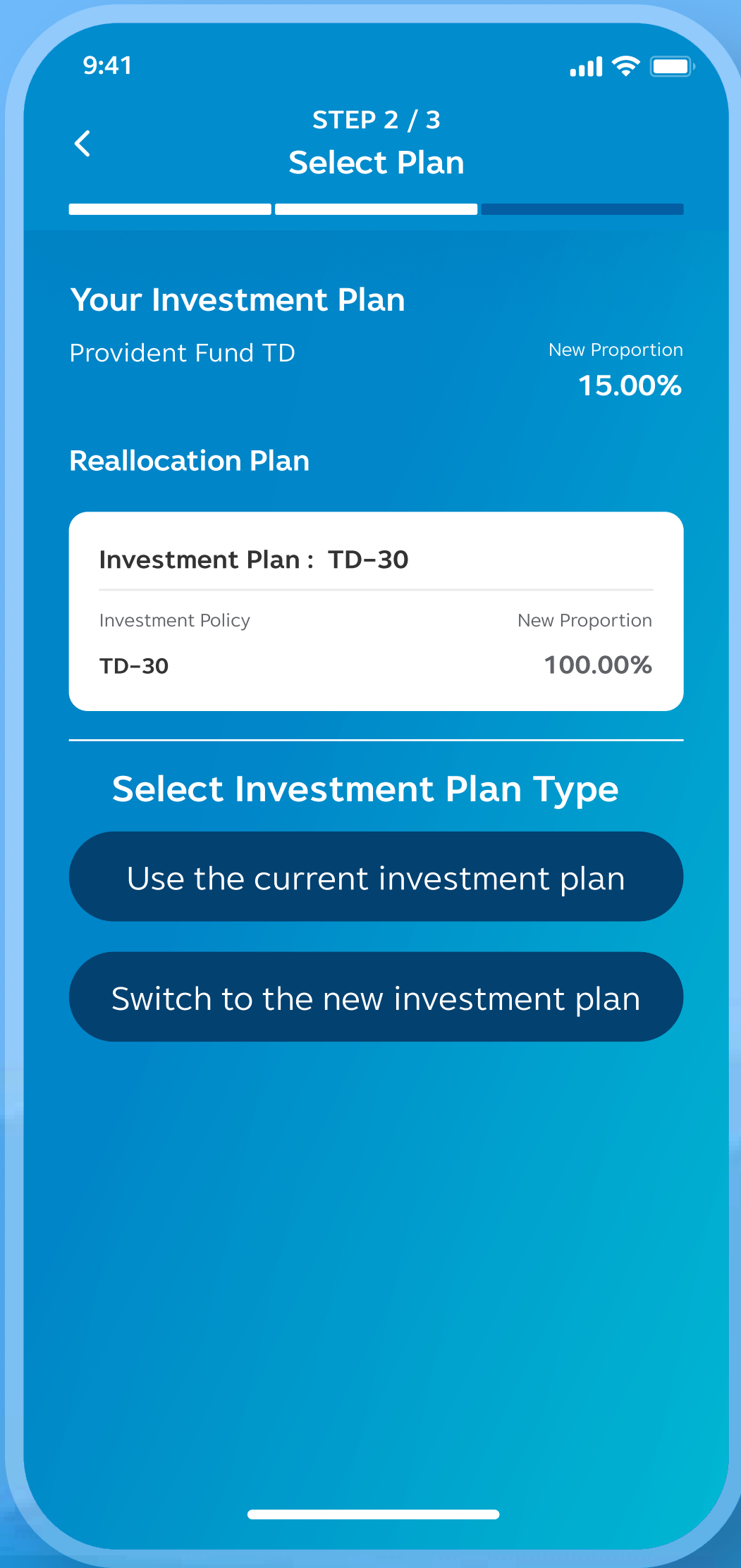


8. Click “Next”.

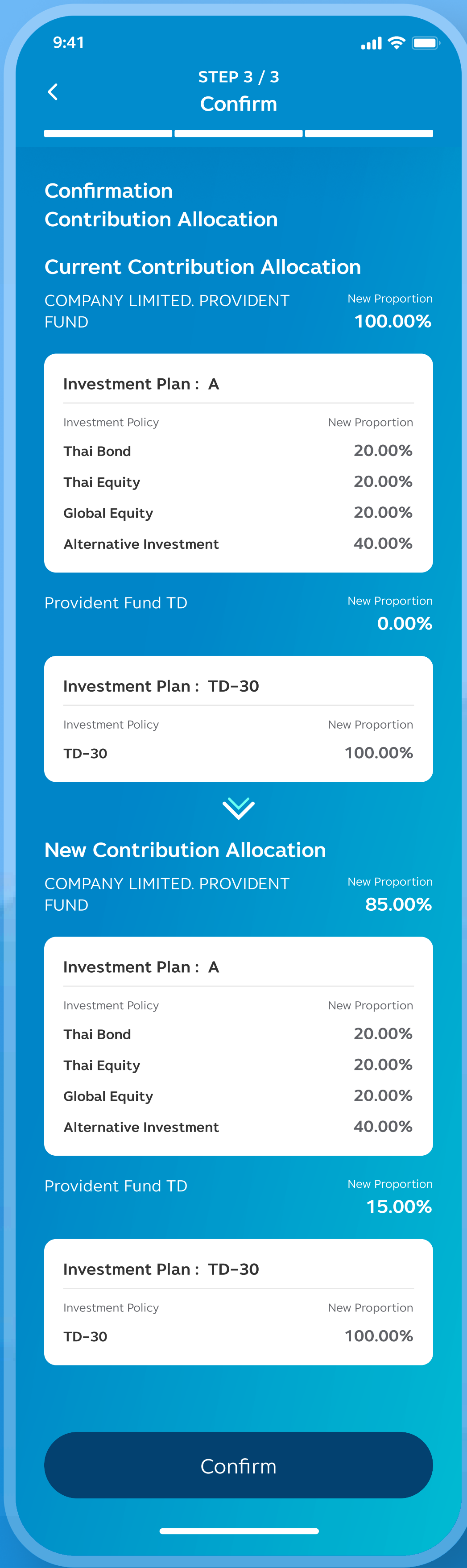
Specify Contribution Allocation: Use the current investment plan



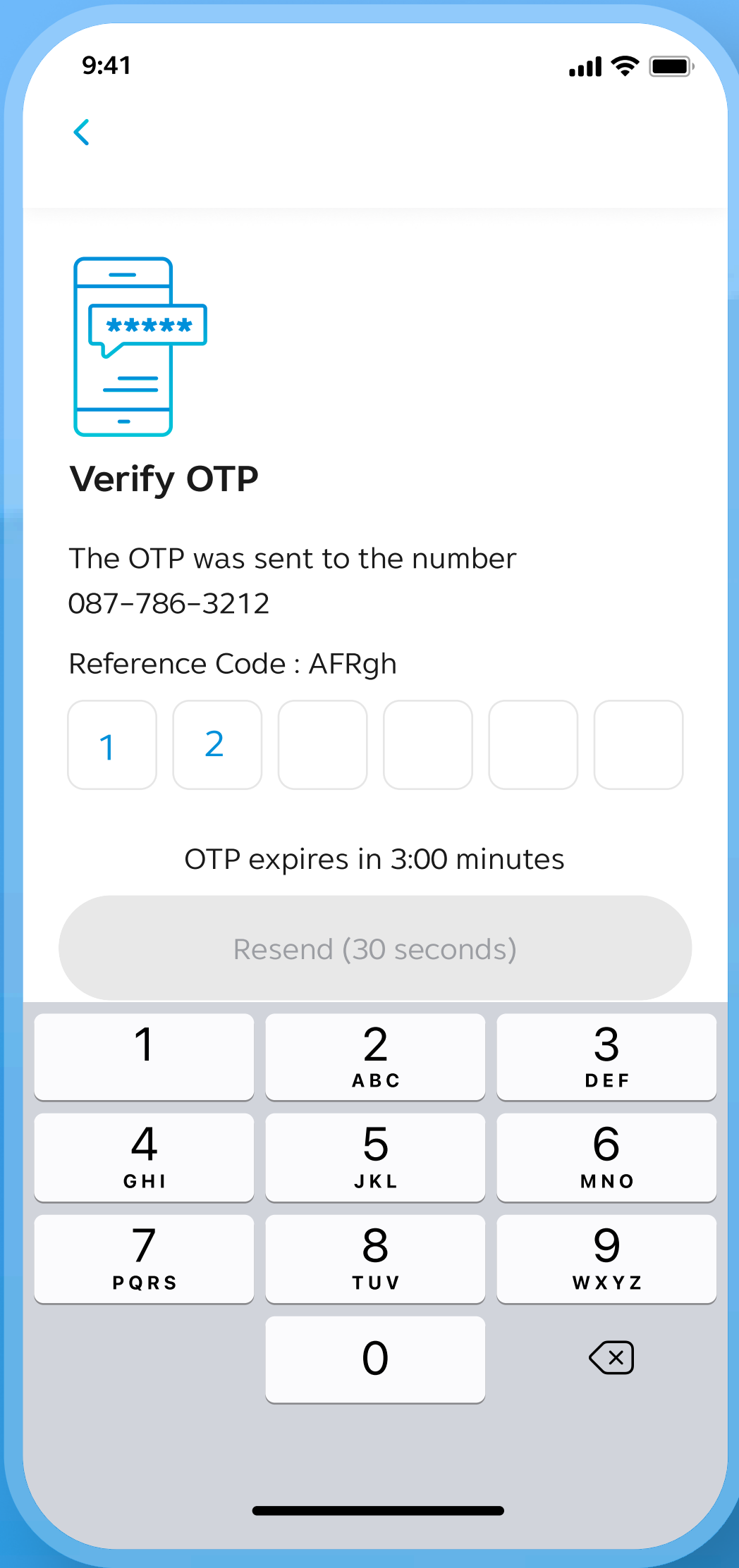
9. Click “Use the current investment plan”.



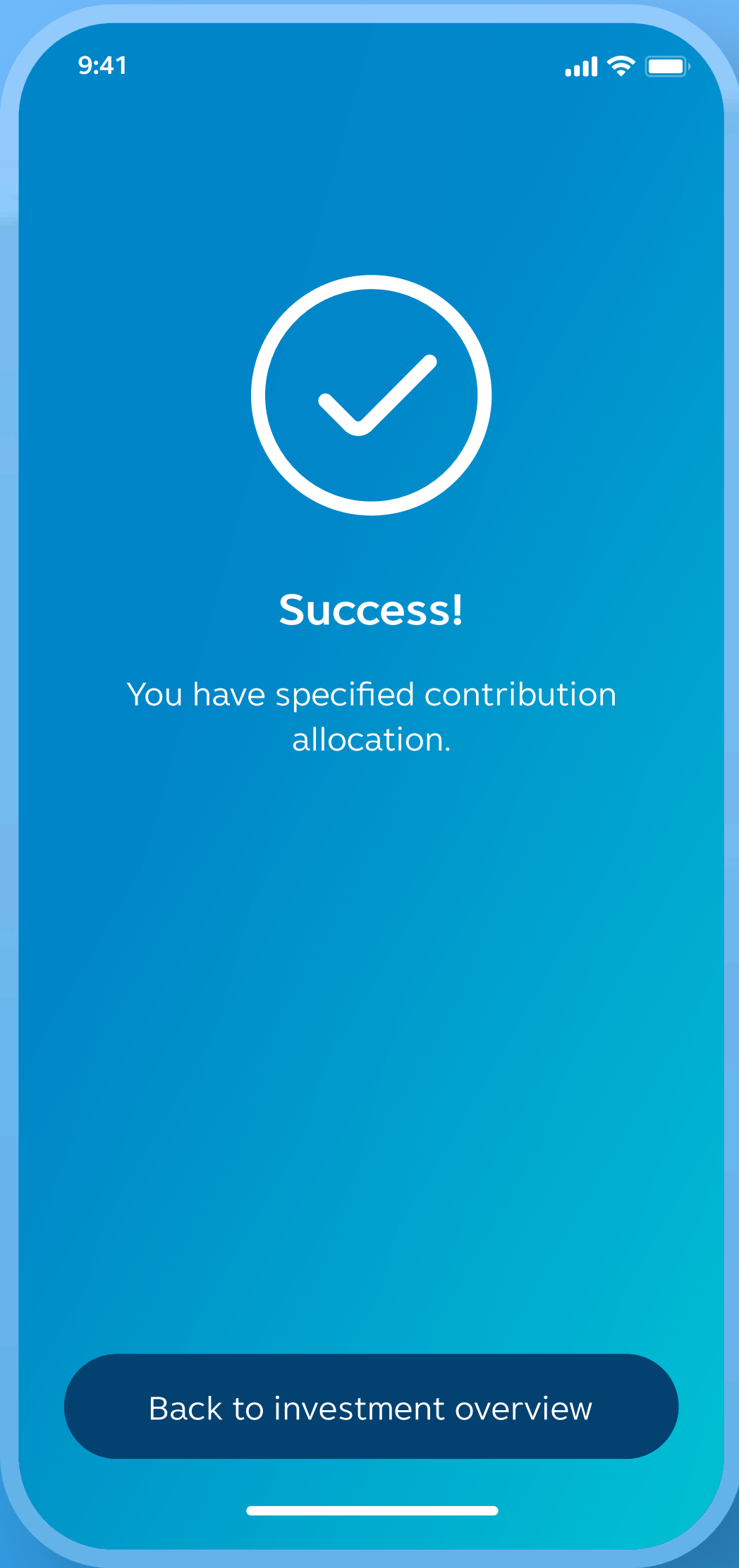
10. Click “Use the current investment plan”.



11. Review the information and click “Confirm”.



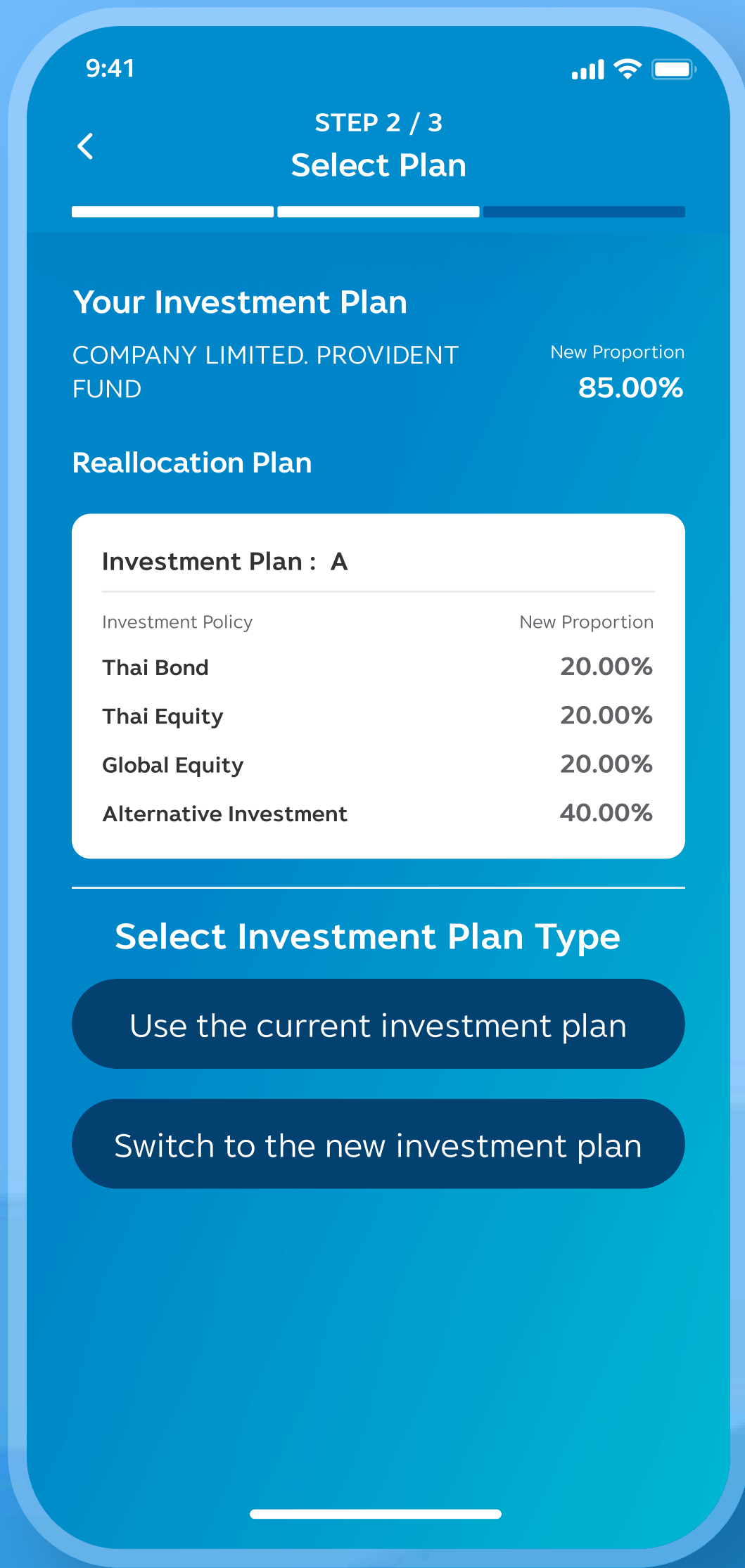
12. Verify OTP.



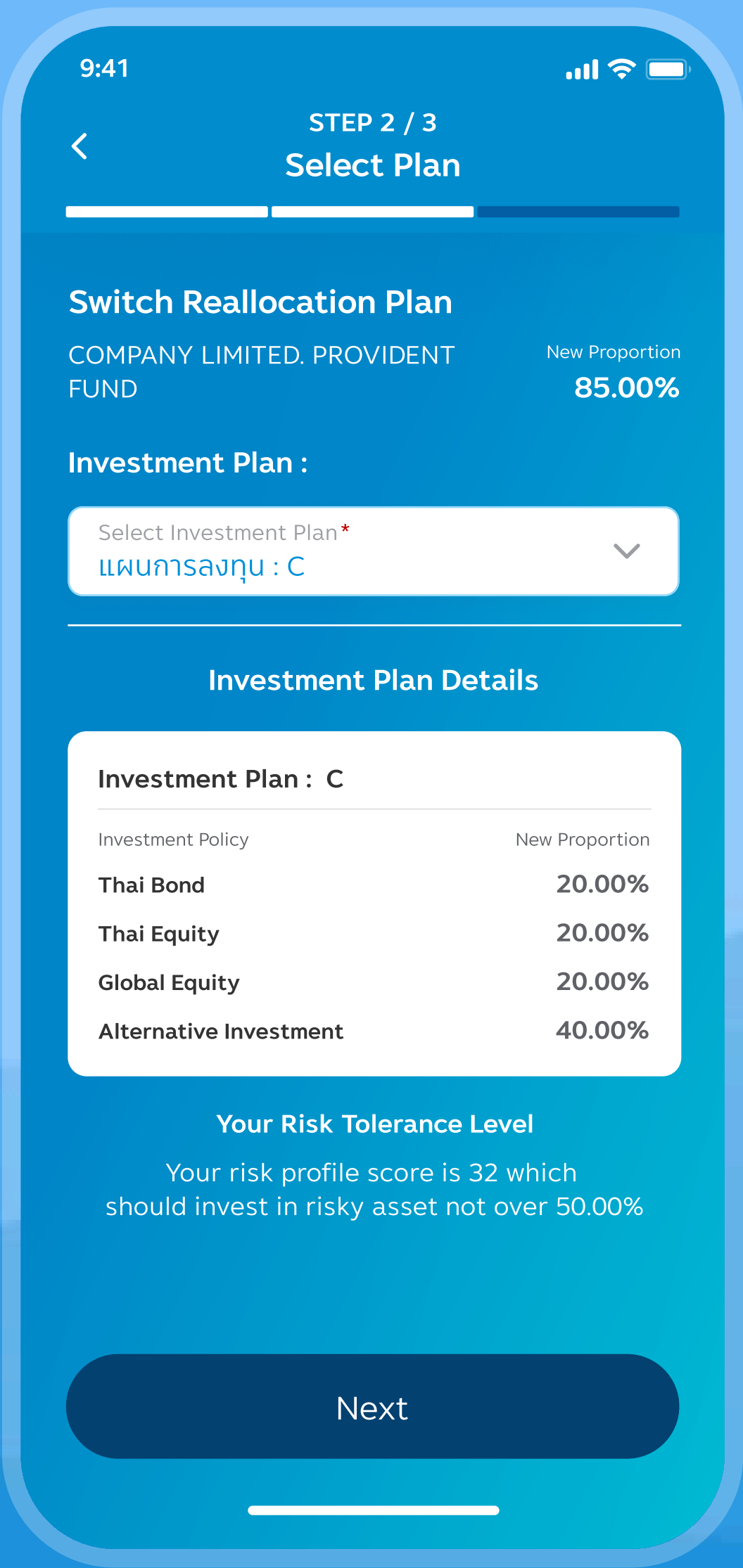
13. The contribution allocation has been changed.

Specify Contribution Allocation

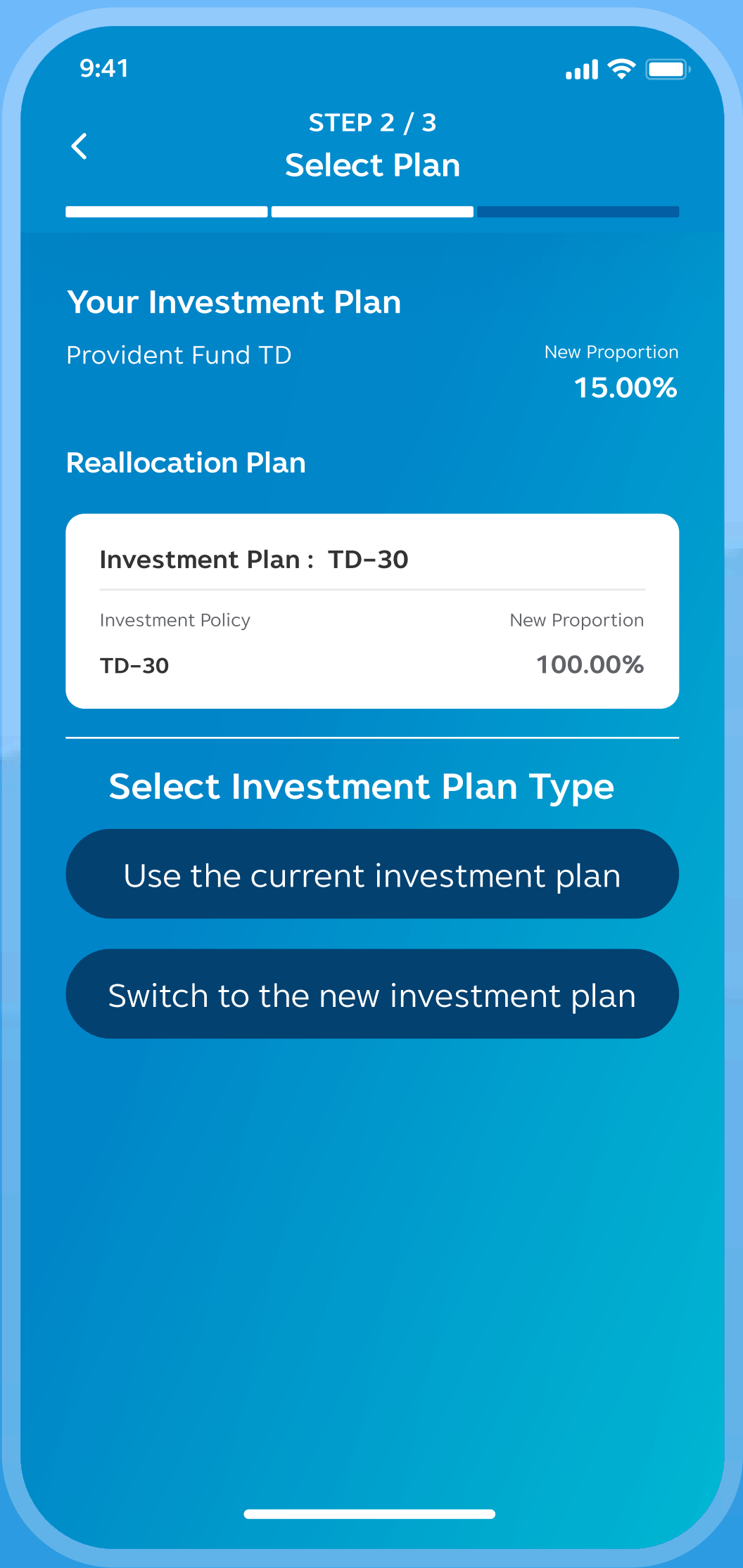
Switch to the new investment plan



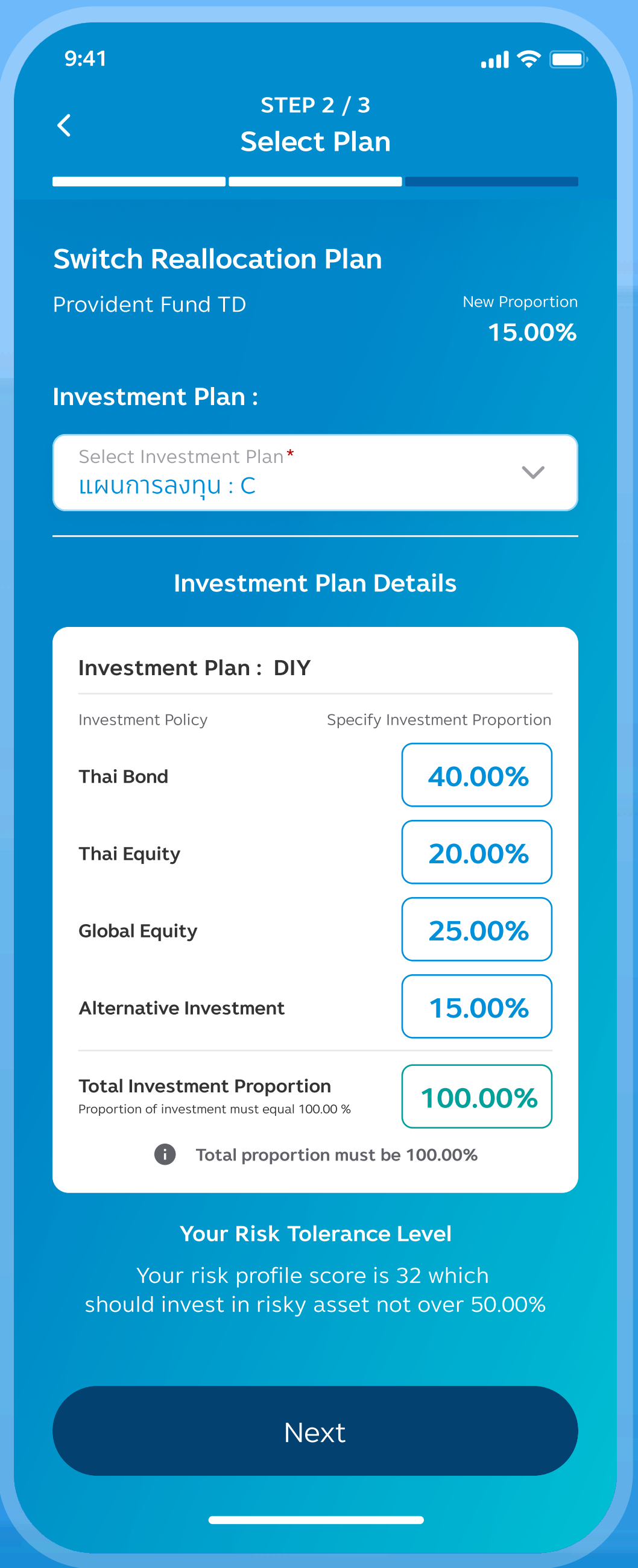
14. Click“Switch to the new investment plan”.



15. Select investment plan and click “Next”.



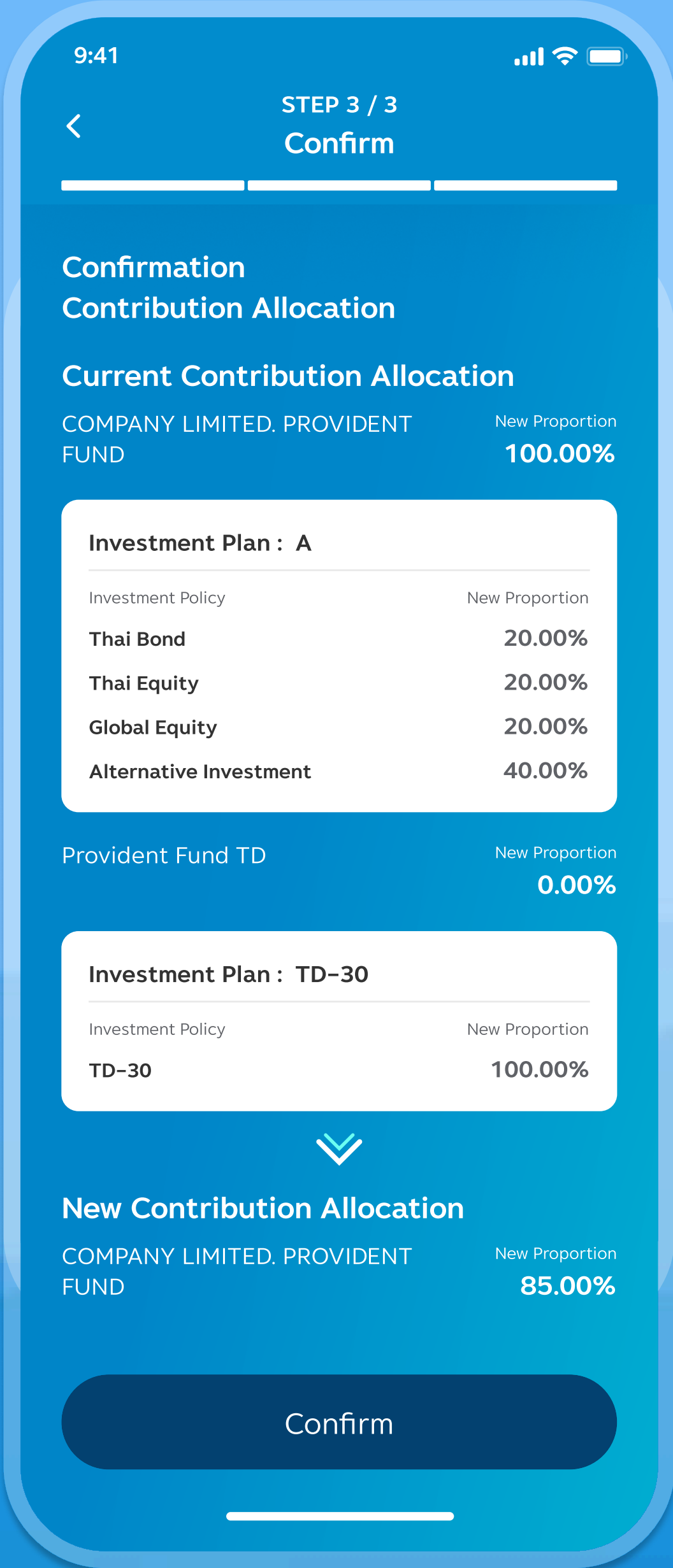
16. Click“Switch to the new investment plan”.



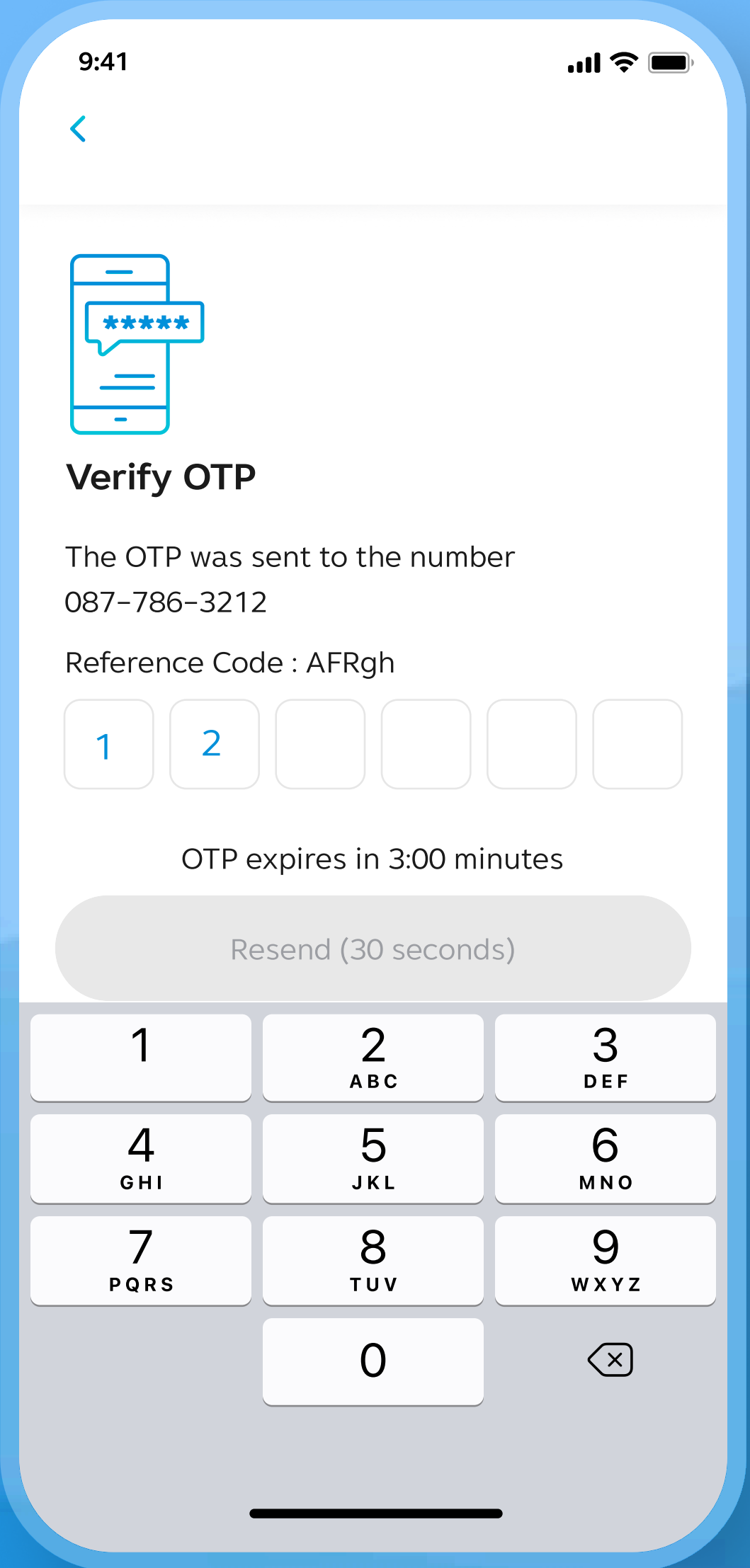
17. Select investment plan and click “Next”.

Specify Contribution Allocation

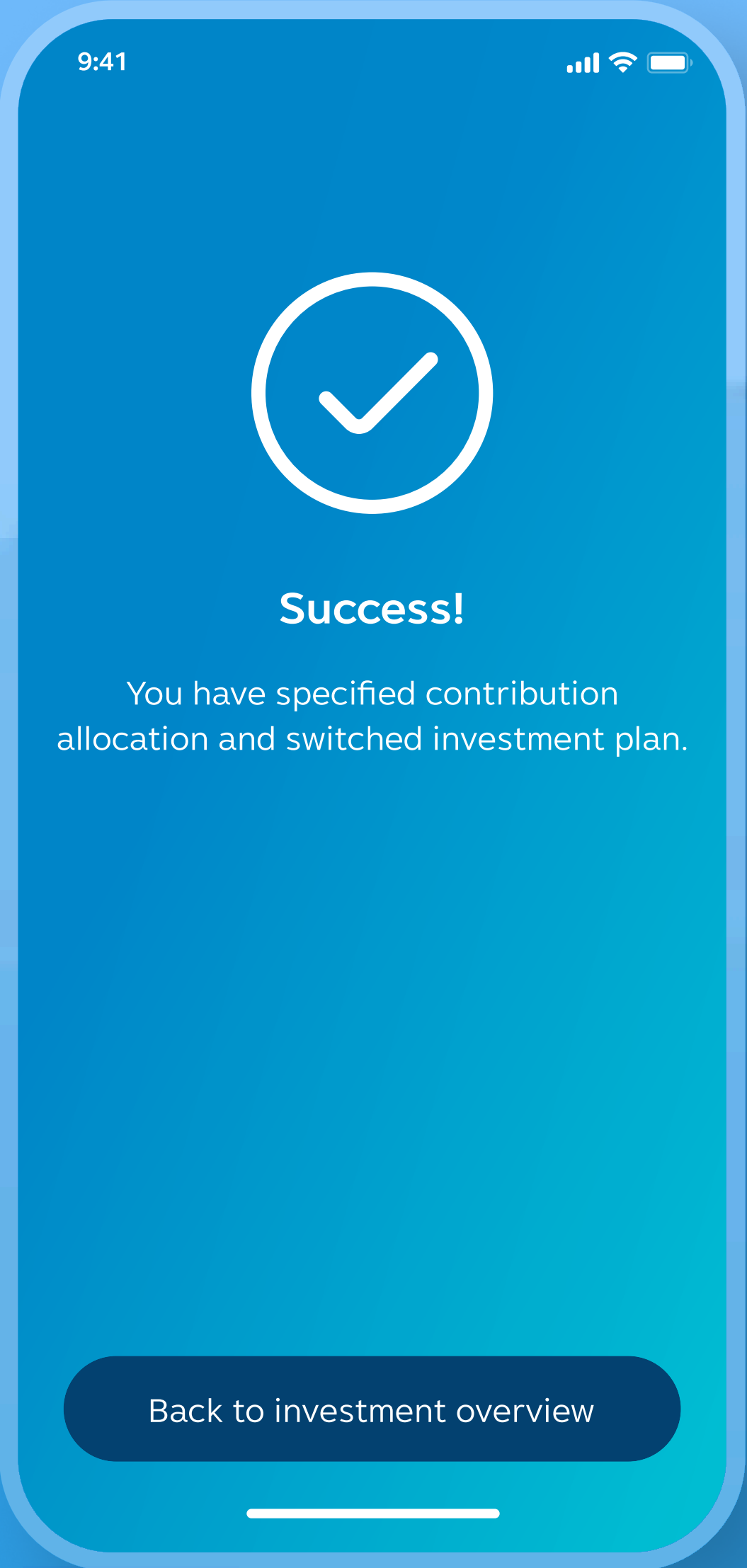
Switch to the new investment plan



18. Review the information and click “Confirm”.



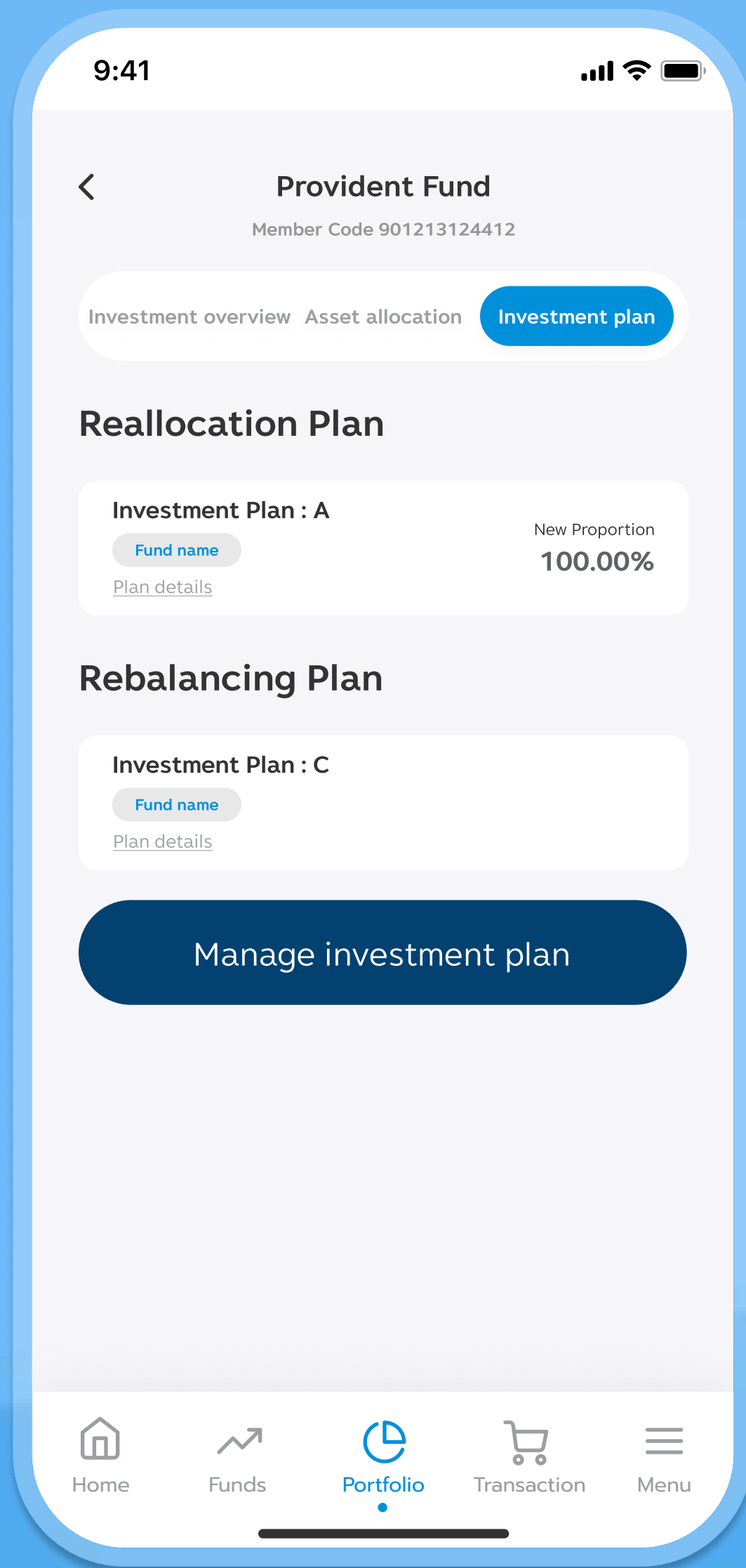
19. Verify OTP.



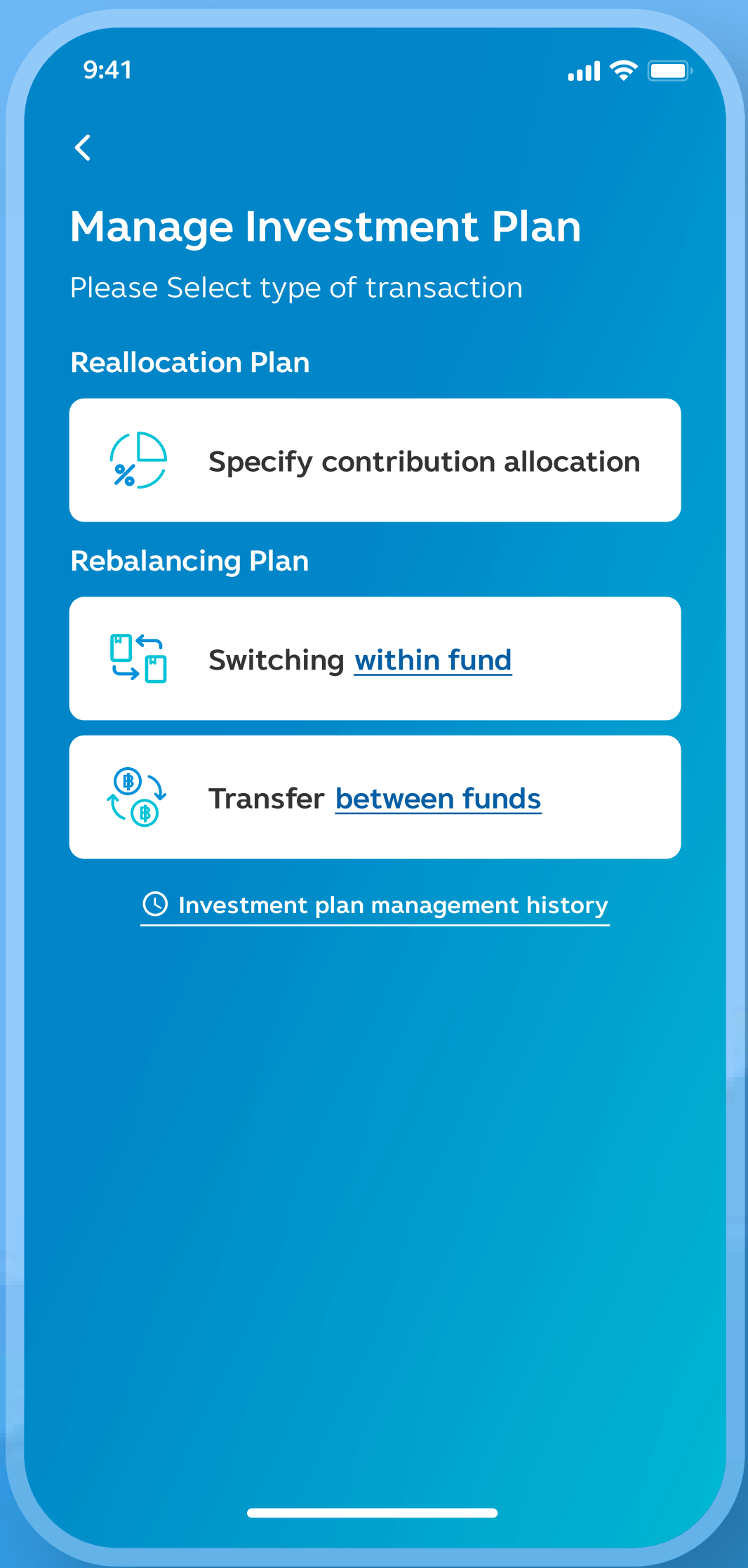
20. The contribution allocation and investment plan have been changed.

Switching within fund

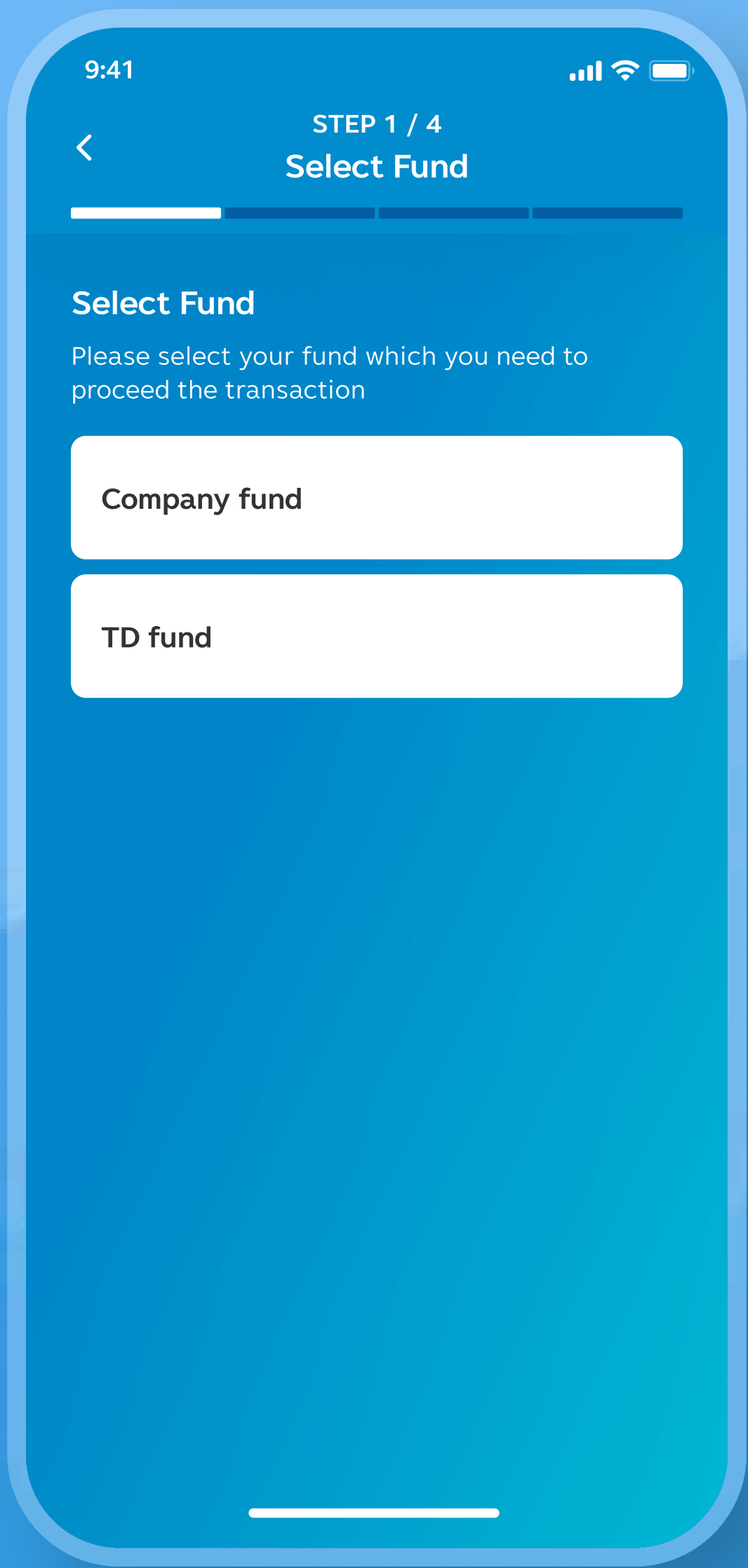
Switching within fund



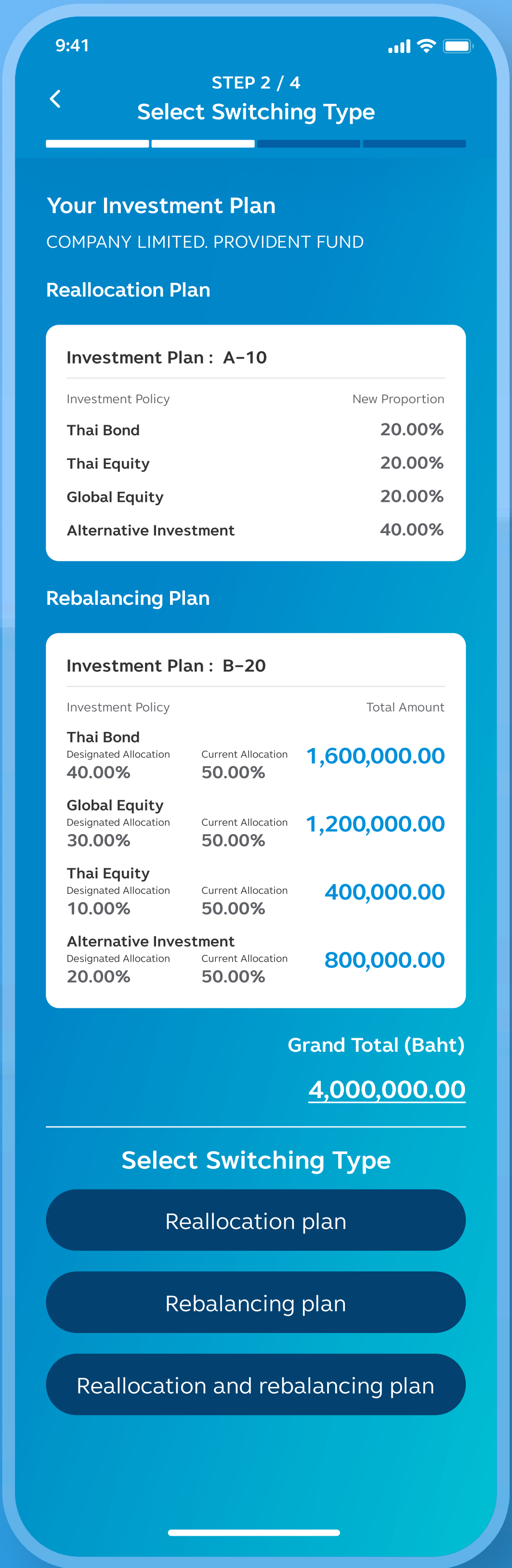
1. Click “Manage investment plan”.



2. Click “Switching within fund”.
The available menu depends on your company policy

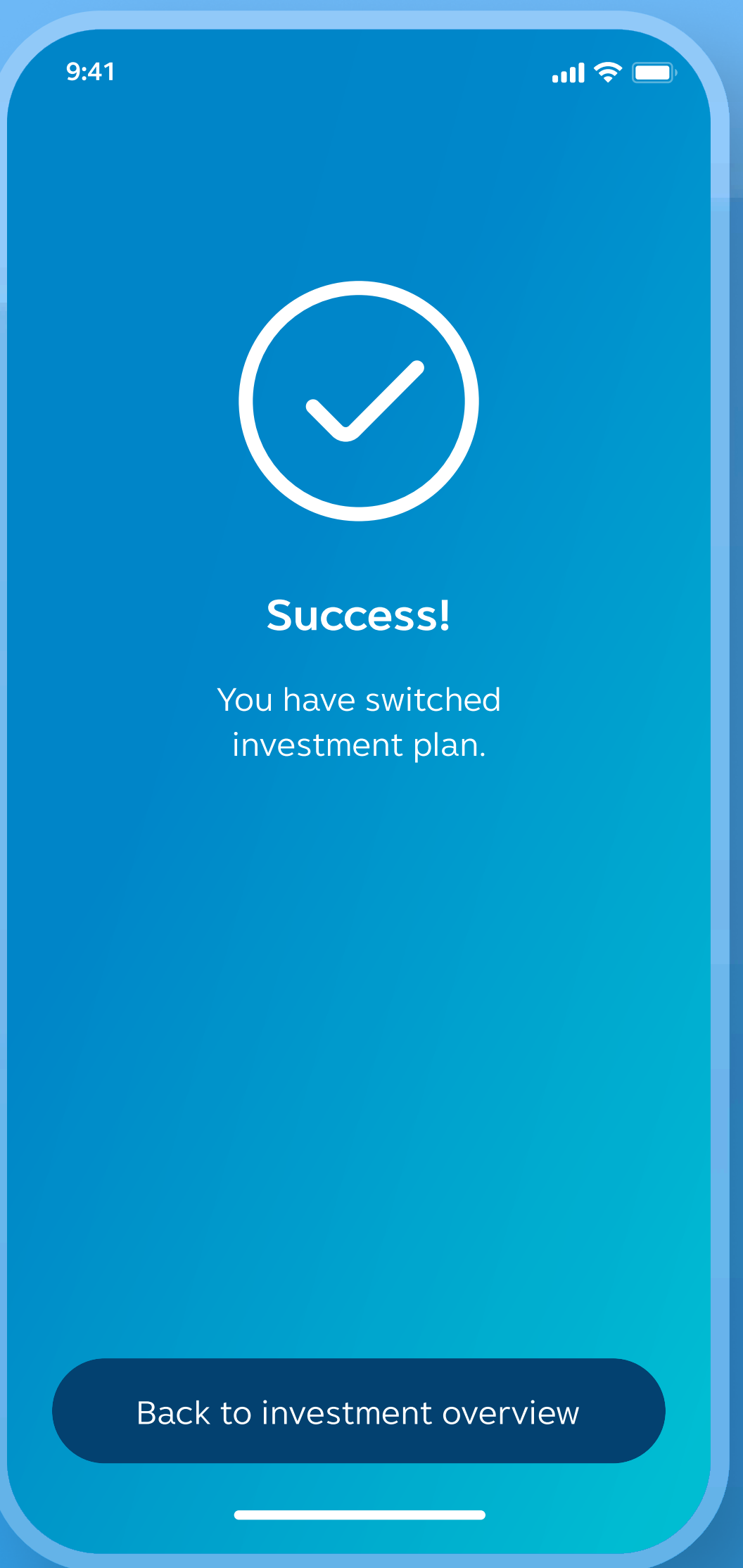
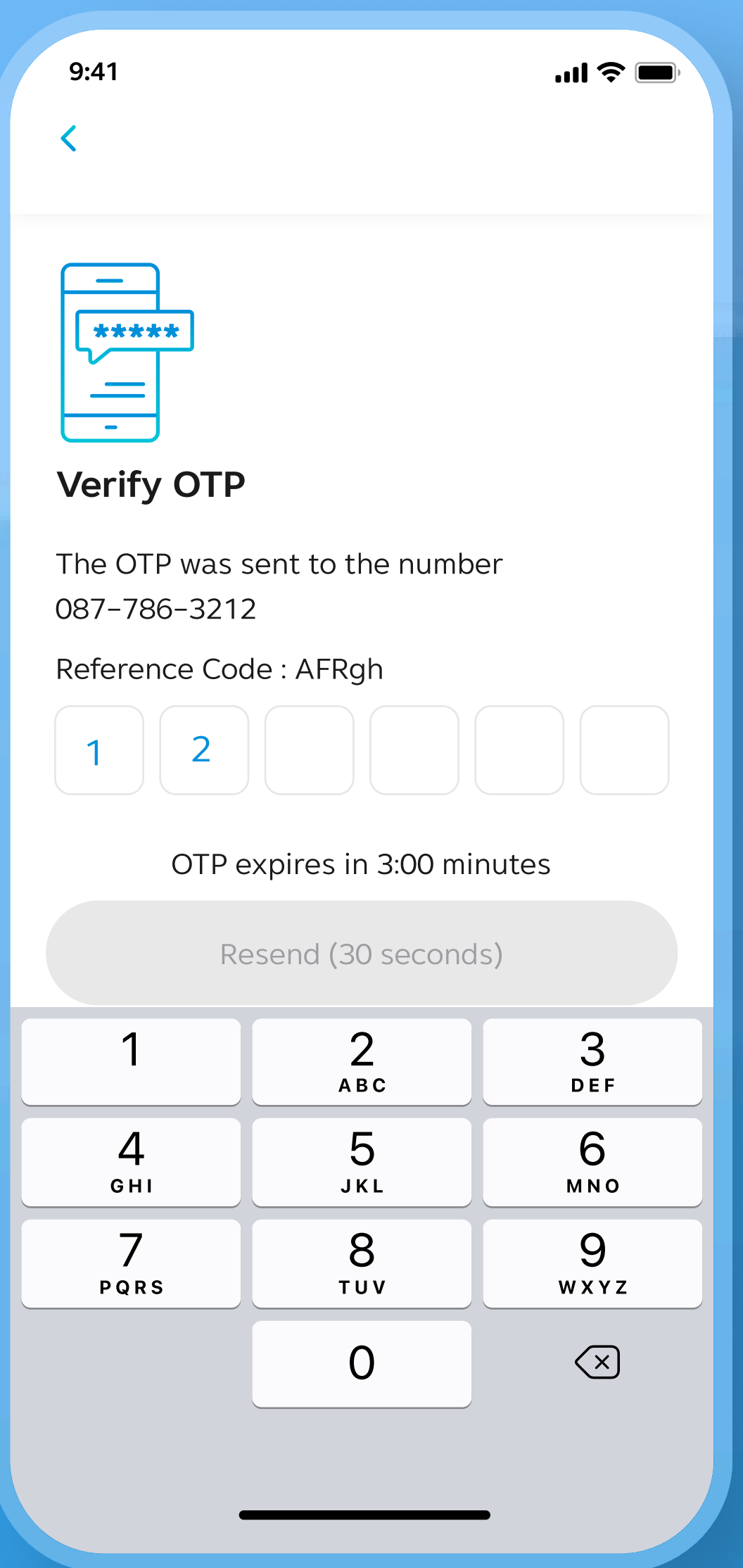
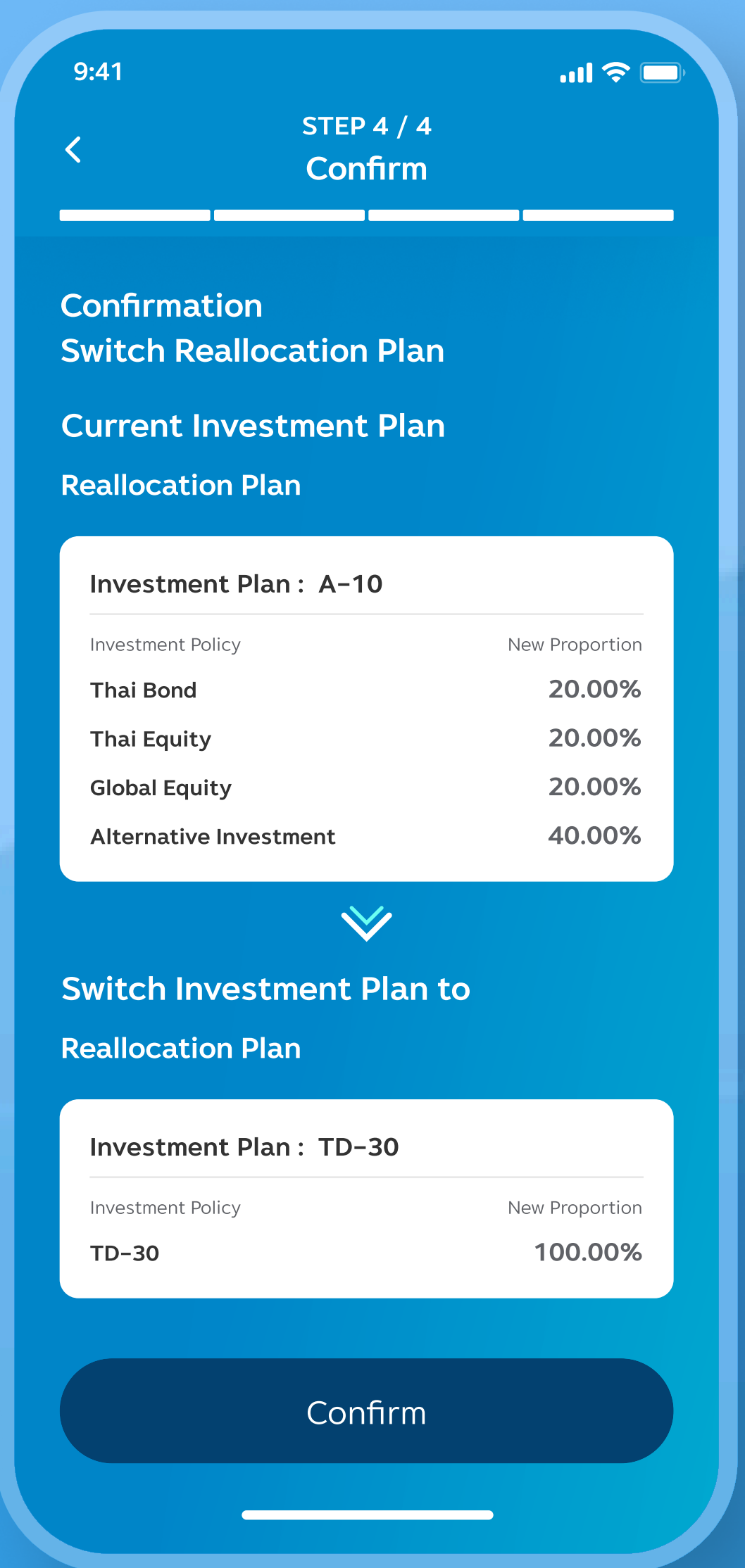
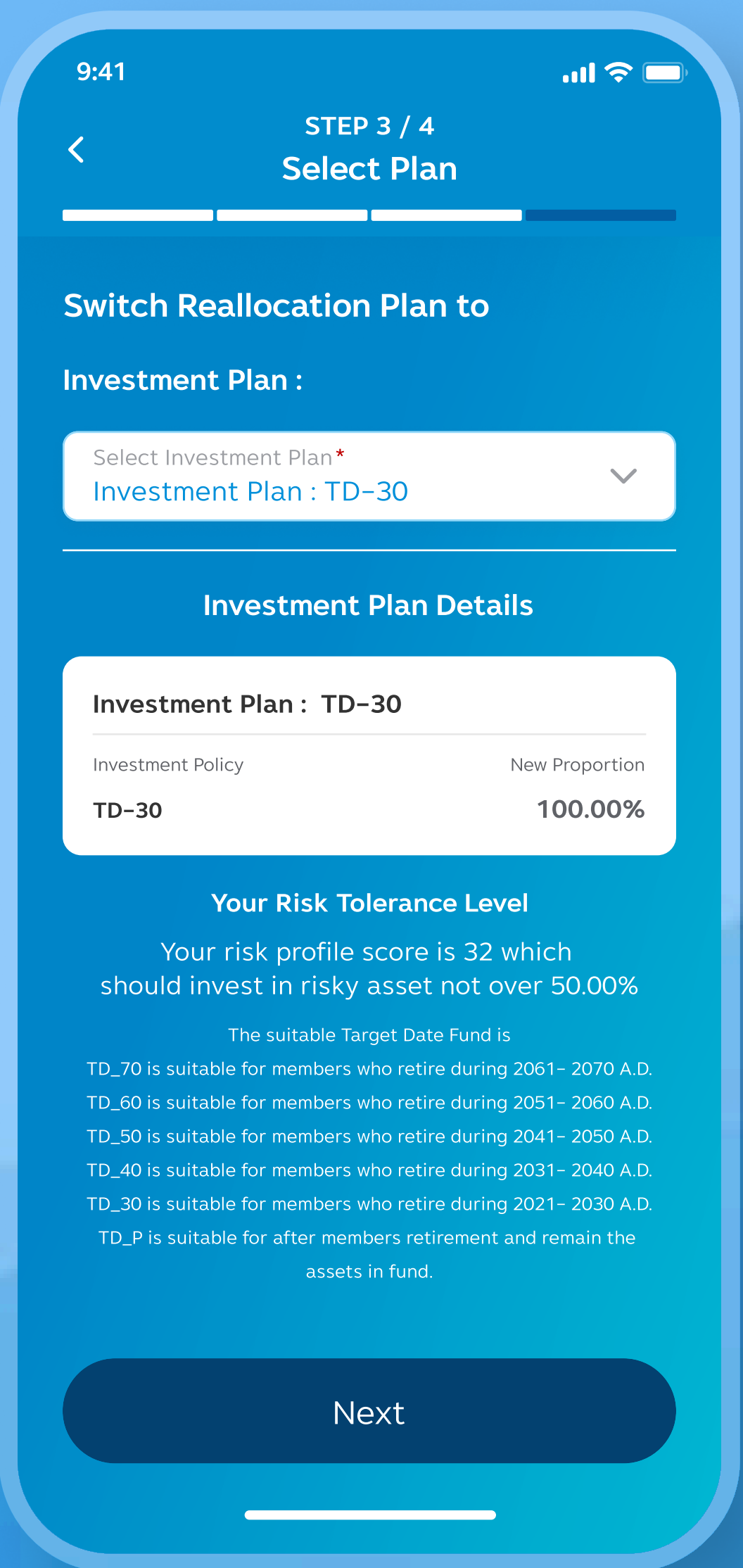
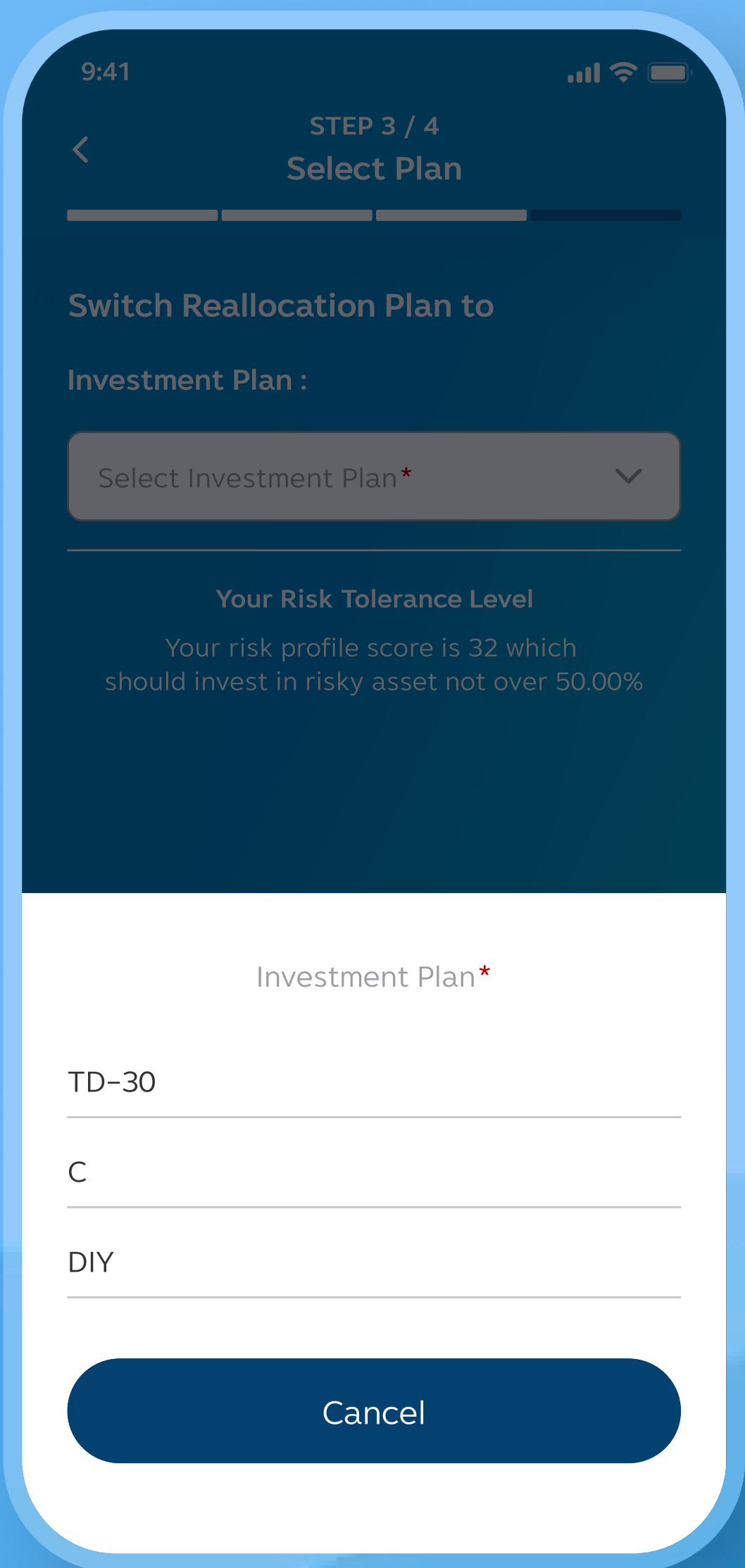
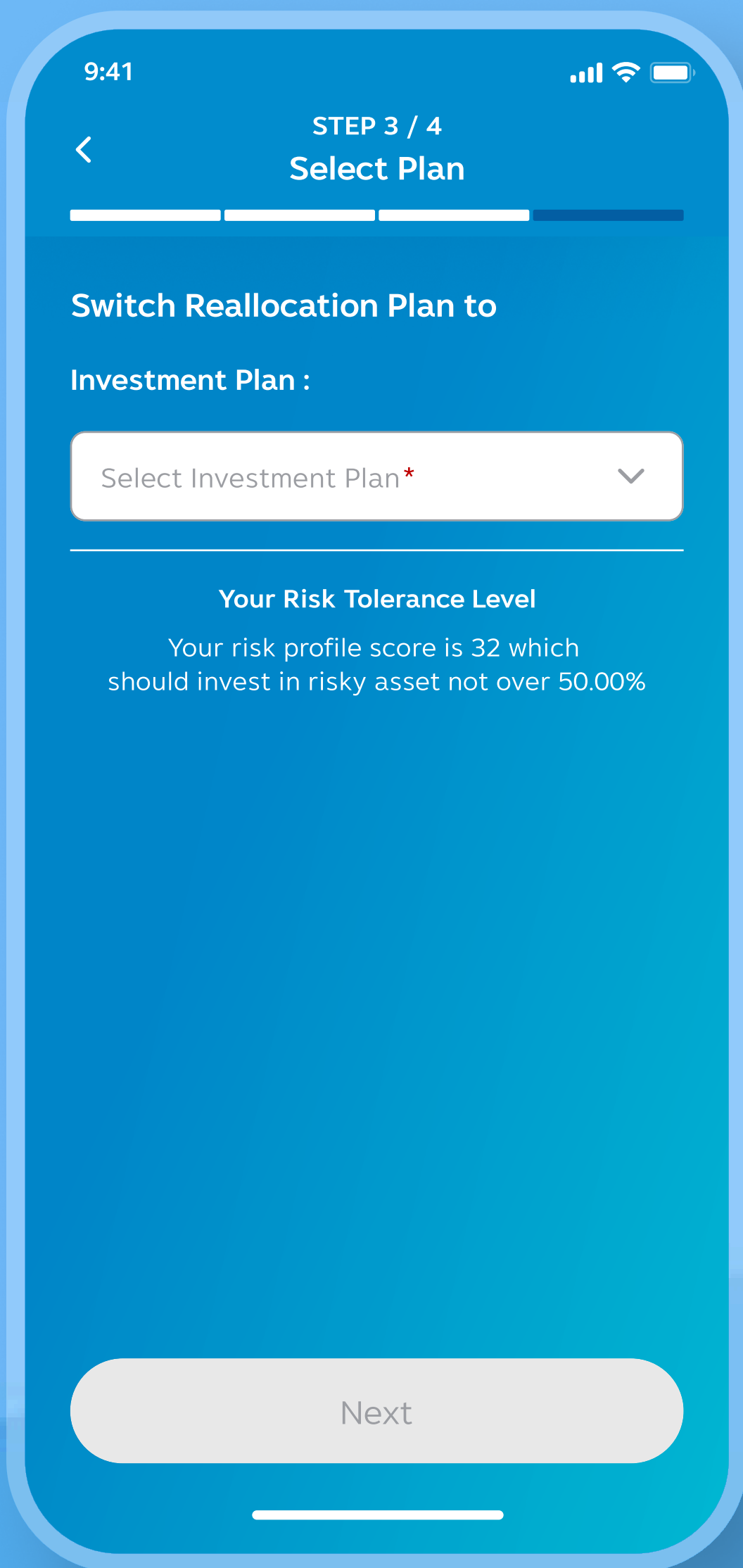


3. Select fund.
**In case there is more than one fund*



4. Select switching type.
–Reallocation plan
–Rebalancing plan
–Reallocation and rebalance plan

Switching within fund (Example: Reallocation plan)



5. Select investment plan.

6. Select investment plan.
*Example: TD-30

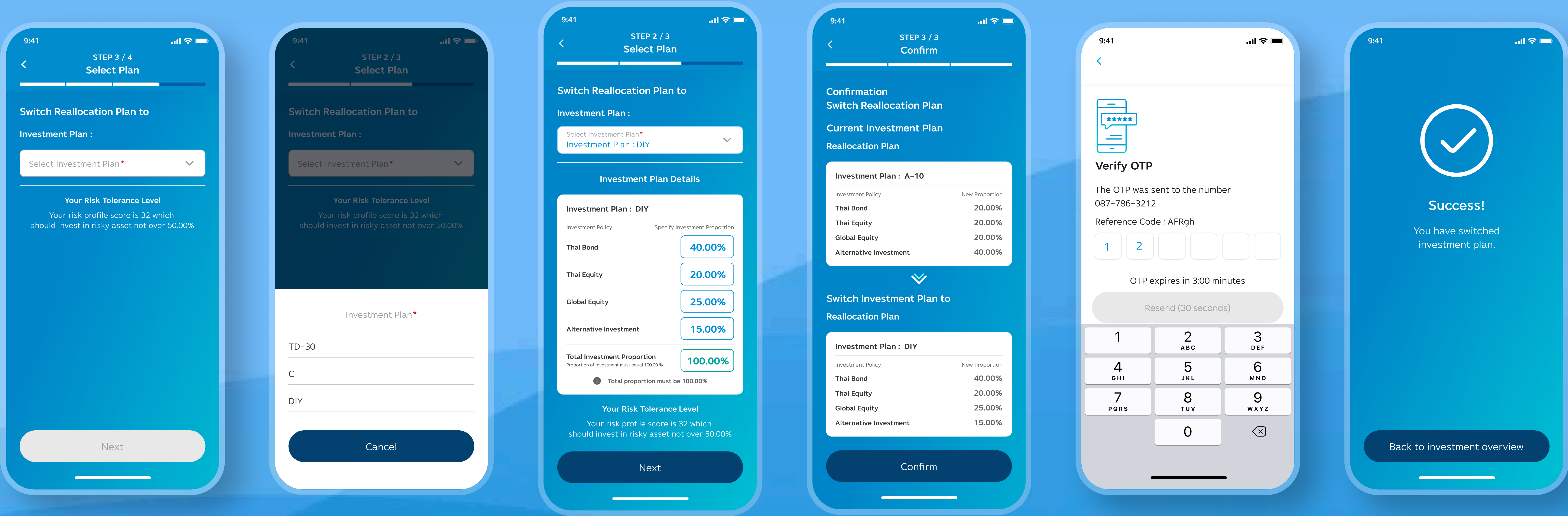
7. Click "Next".

8. Review information
and click "Confirm".

9. Verify OTP.

10. Investment plan
has been switched.

Switching within fund: **DIY Investment Plan** (Example: Reallocation plan)



11. Select investment plan.

12. Select investment plan
**Example: DIY*

13. Fill in the DIY investment plan. Total investment proportion must equal 100%

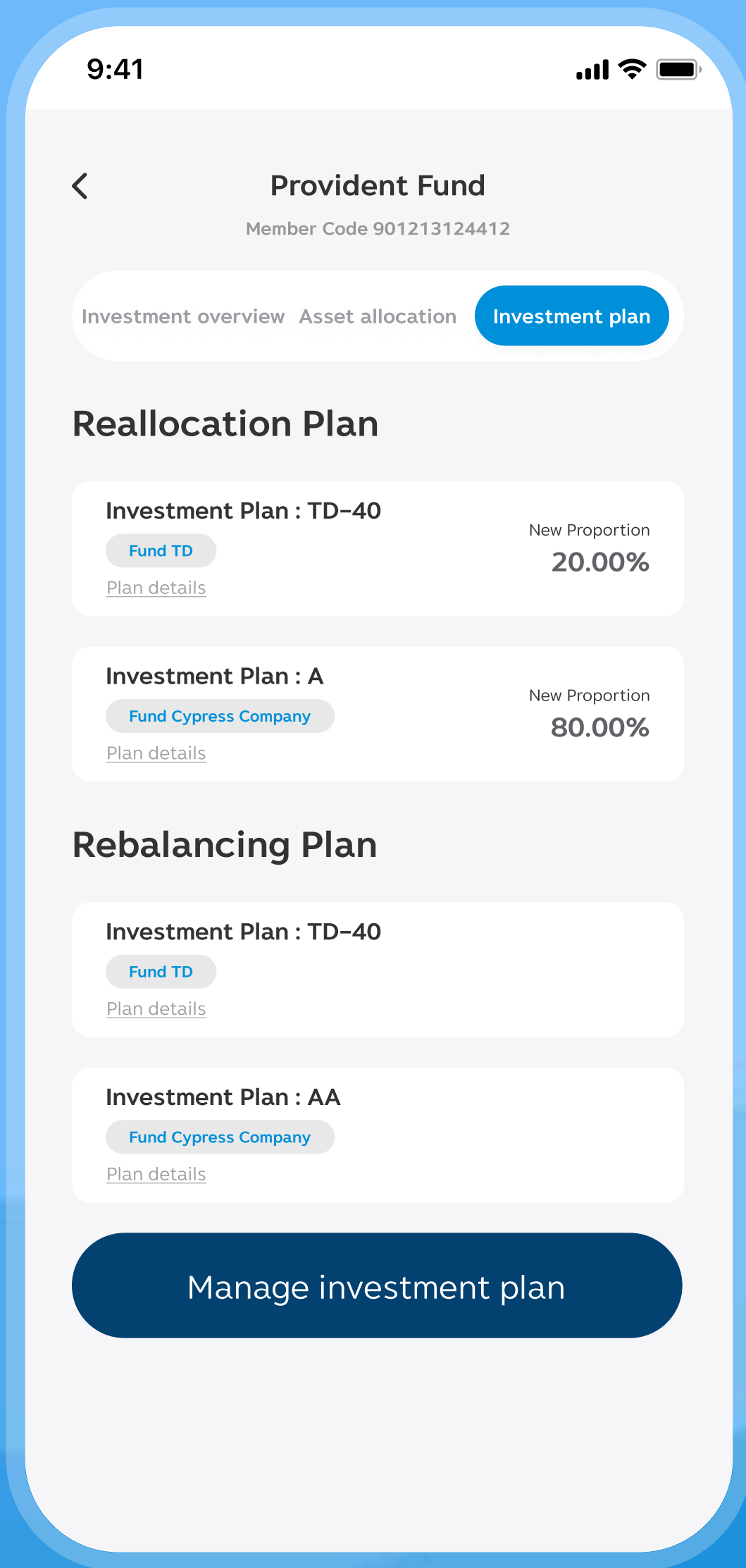
14. Review information and click “Confirm”.

15. Verify OTP

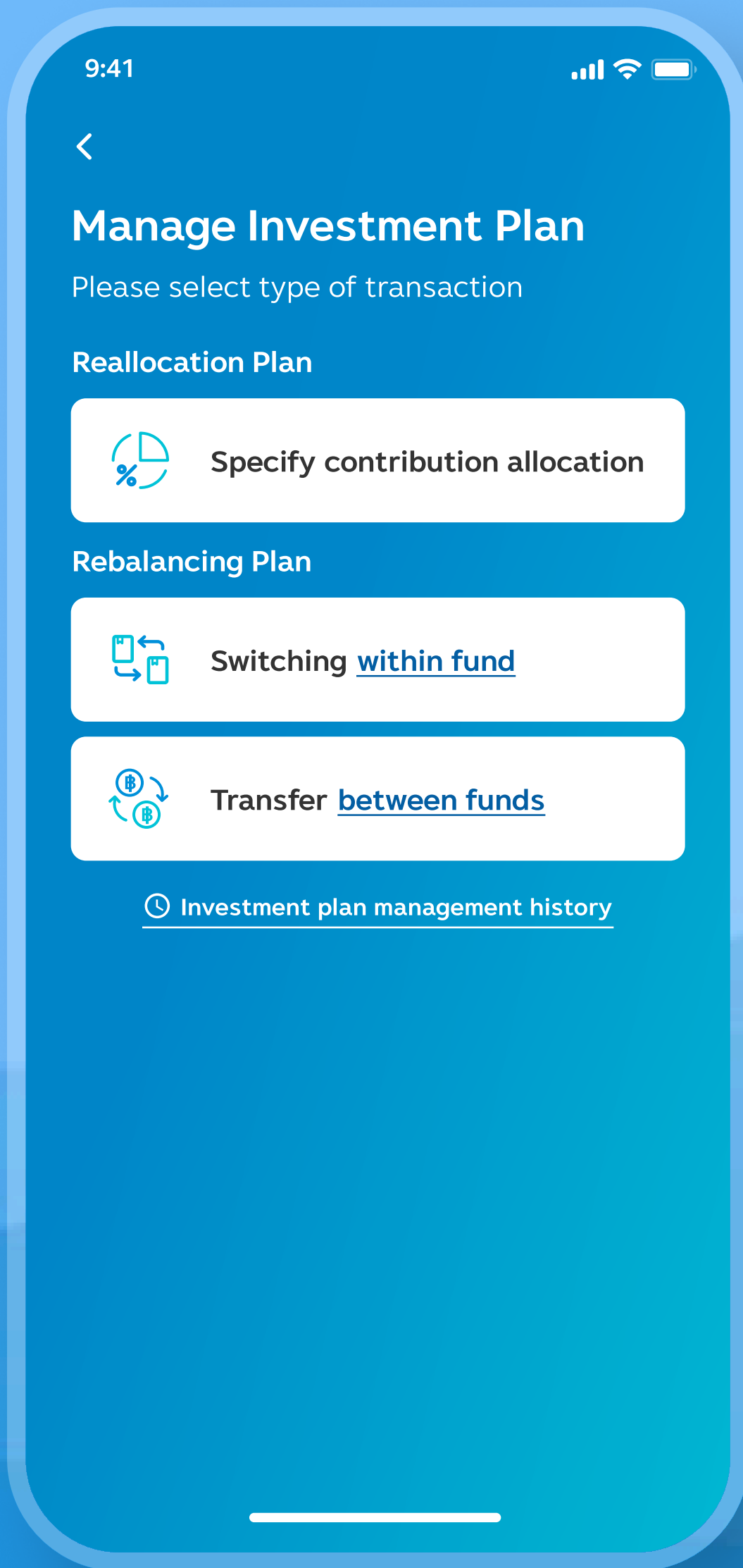
16. Investment plan has been switched.

Transfer between funds

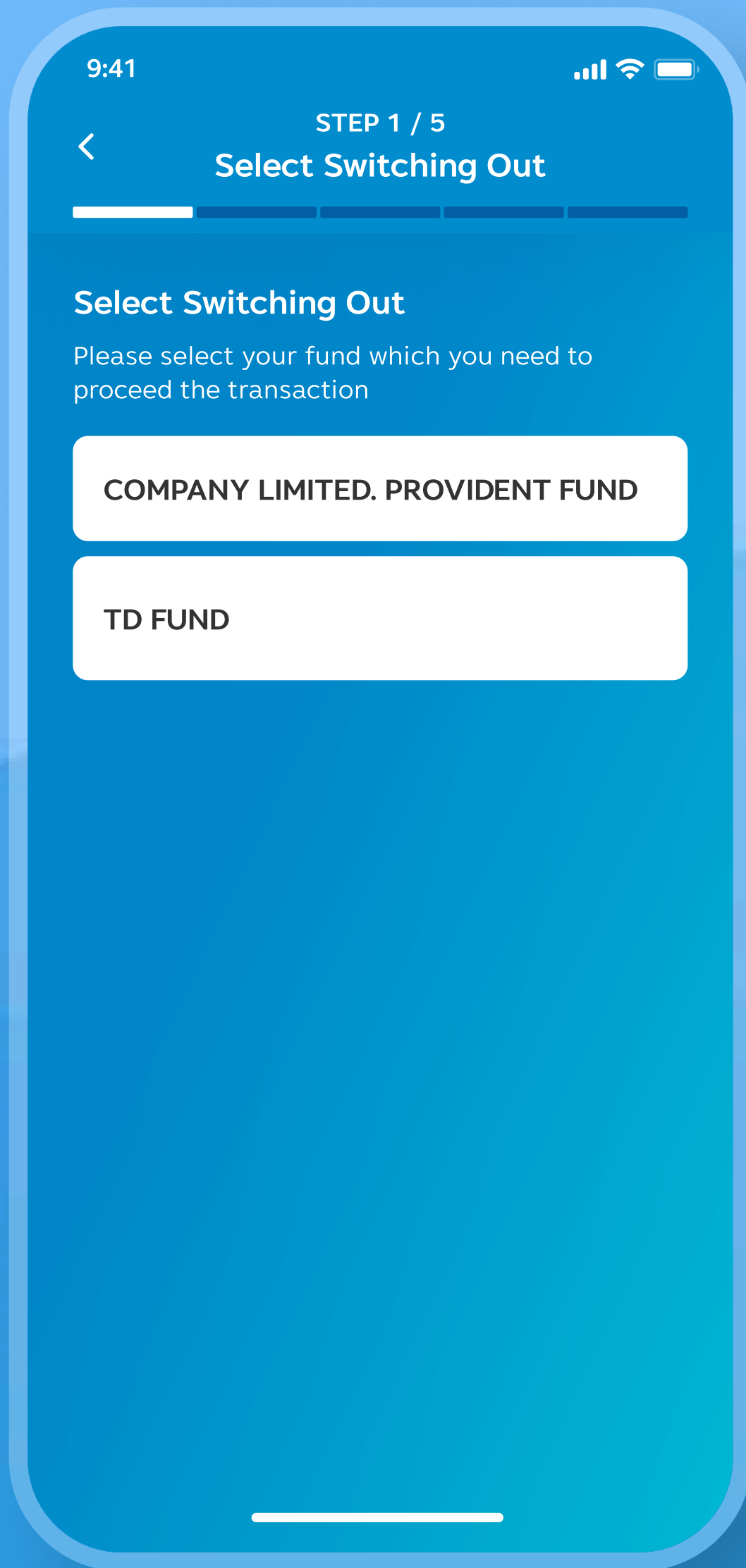
Transfer between funds



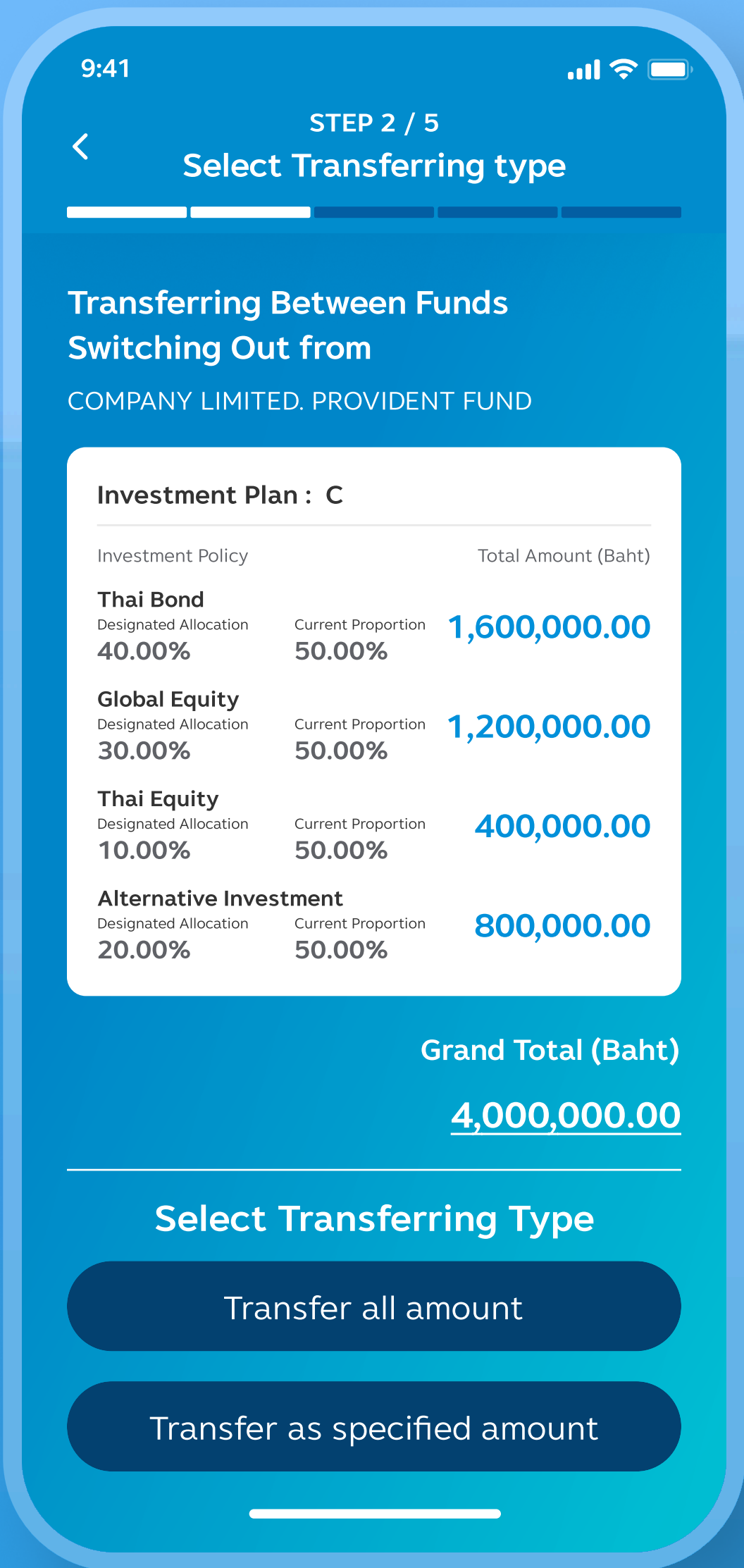
1. Click
“Manage investment plan”



2. Click
“Transfer between funds”



3. Select fund



4. Select transfer type

Transfer between funds

9:41

STEP 2 / 5

Transfer As Specified Amount

Transferring Between Funds

Switching Out from

COMPANY LIMITED, PROVIDENT FUND

Investment Plan : C

Investment Policy	Transfer Amount (Baht)
Thai Bond Current Proportion 30.00% Current Amount 1,600,000.00	0.00
Thai Equity Current Proportion 20.00% Current Amount 800,000.00	20,000.00
Global Equity Current Proportion 30.00% Current Amount 800,000.00	150,000.00
Alternative Investment Current Proportion 20.00% Current Amount 800,000.00	0.00

Grand Total (Baht)

170,000.00

Next

5. Fill in transfer amount

In case transfer as specified amount is selected

9:41

STEP 3 / 5

Select Plan

Transferring Between Funds

Switching In to

COMPANY LIMITED, PROVIDENT FUND

Investment Plan :

Select Investment Plan*

Your Risk Tolerance Level

Your risk profile is 32 which should invest in risky asset not over 50.00%

Next

6. Select investment plan

9:41

STEP 3 / 5

Select Plan

Transferring Between Funds

Switching In to

COMPANY LIMITED, PROVIDENT FUND

Investment Plan :

Select Investment Plan*

Your Risk Tolerance Level

Your risk profile is 32 which should invest in risky asset not over 50.00%

Investment Plan*

TD-30

C

DIY

Cancel

7. Select investment plan

9:41

STEP 3 / 5

Select Plan

Transferring Between Funds

Switching In to

COMPANY LIMITED, PROVIDENT FUND

Investment Plan :

Select Investment Plan*

Investment Plan : TD-30

Investment Plan Details

Investment Plan : TD-30

Investment Policy	New Proportion
TD-30	100.00%

Your Risk Tolerance Level

Your risk profile score is 32 which should invest in risky asset not over 50.00%.

The suitable Target Date Fund is

TD_70 is suitable for members who retire during 2061~ 2070 A.D.

TD_60 is suitable for members who retire during 2051~ 2060 A.D.

TD_50 is suitable for members who retire during 2041~ 2050 A.D.

TD_40 is suitable for members who retire during 2031~ 2040 A.D.

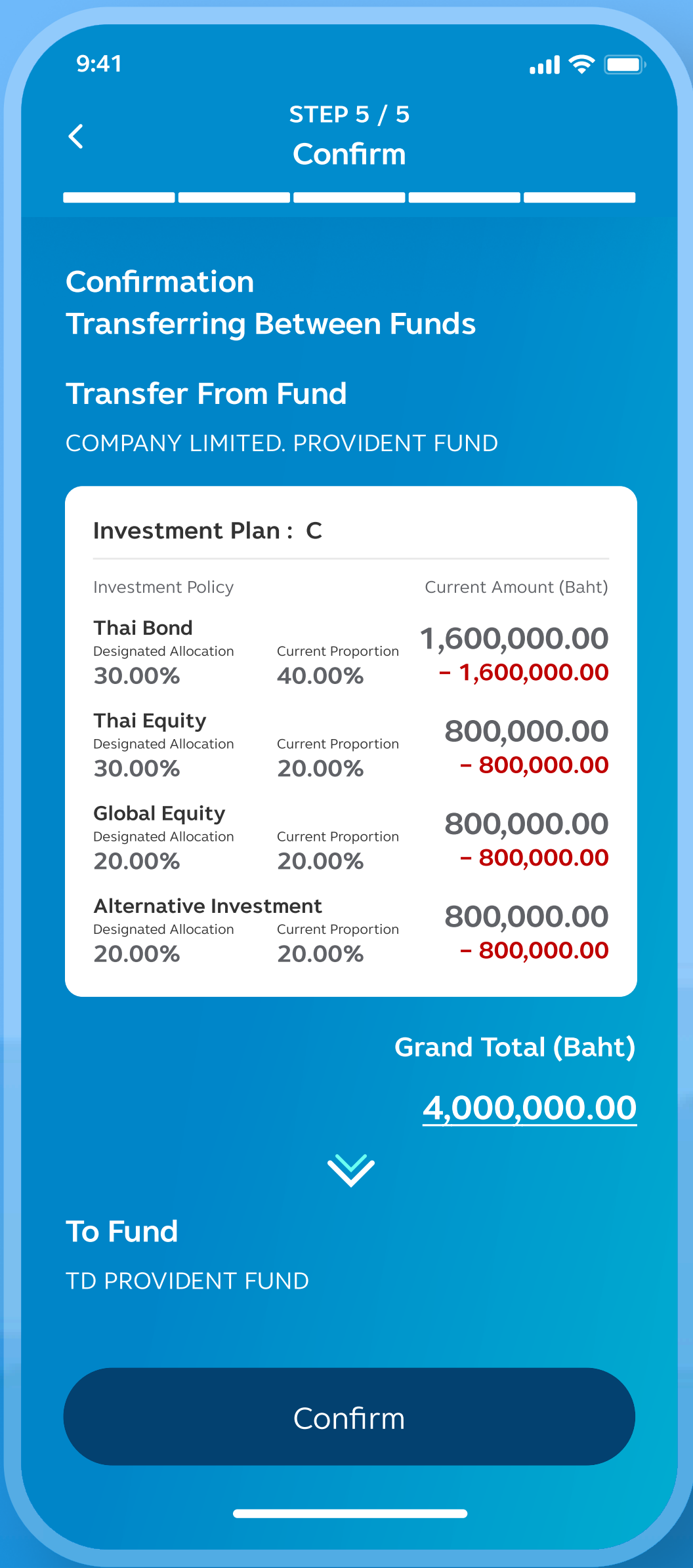
TD_30 is suitable for members who retire during 2021~ 2030 A.D.

TD_P is suitable for after members retirement and remain the assets in fund.

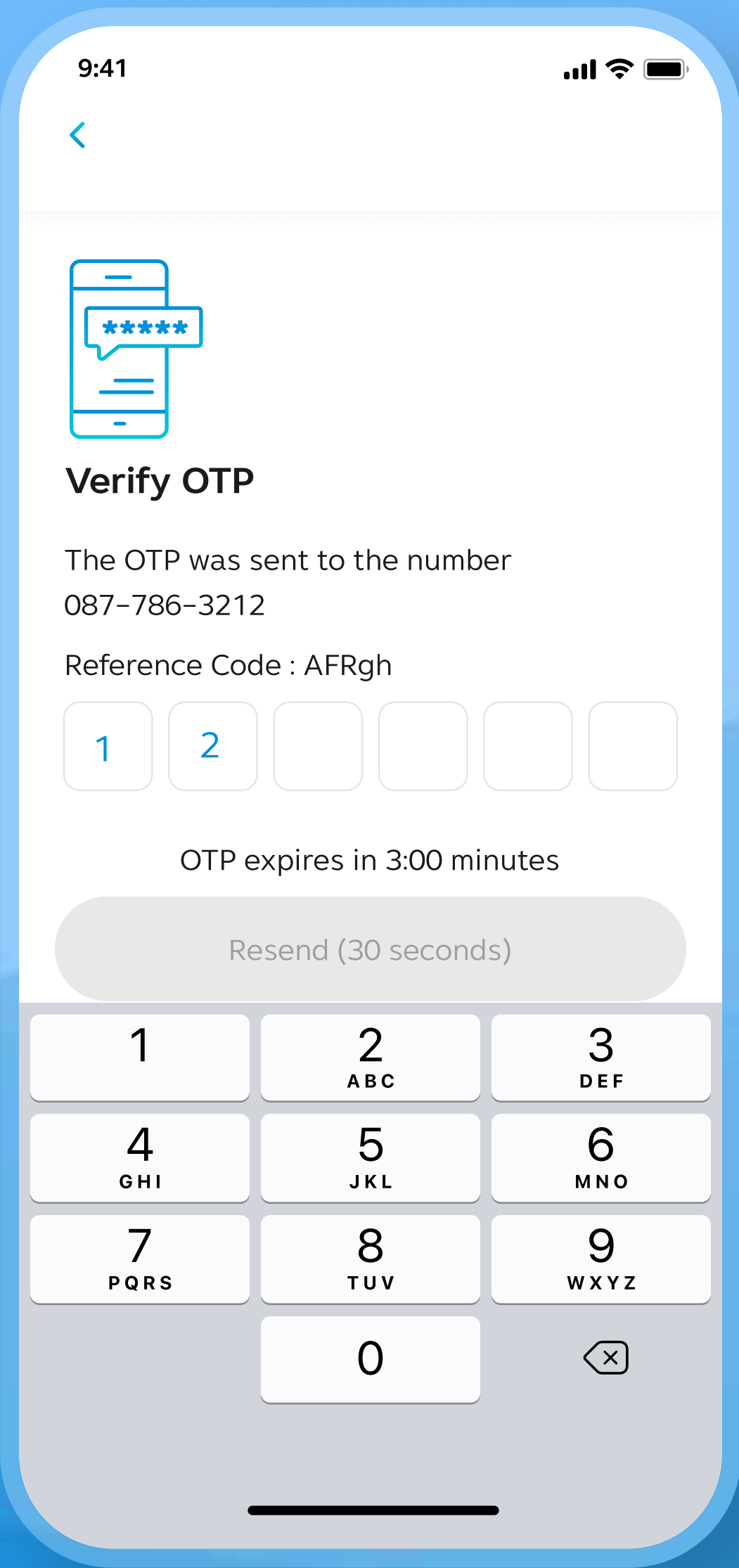
Next

8. Click “Next”

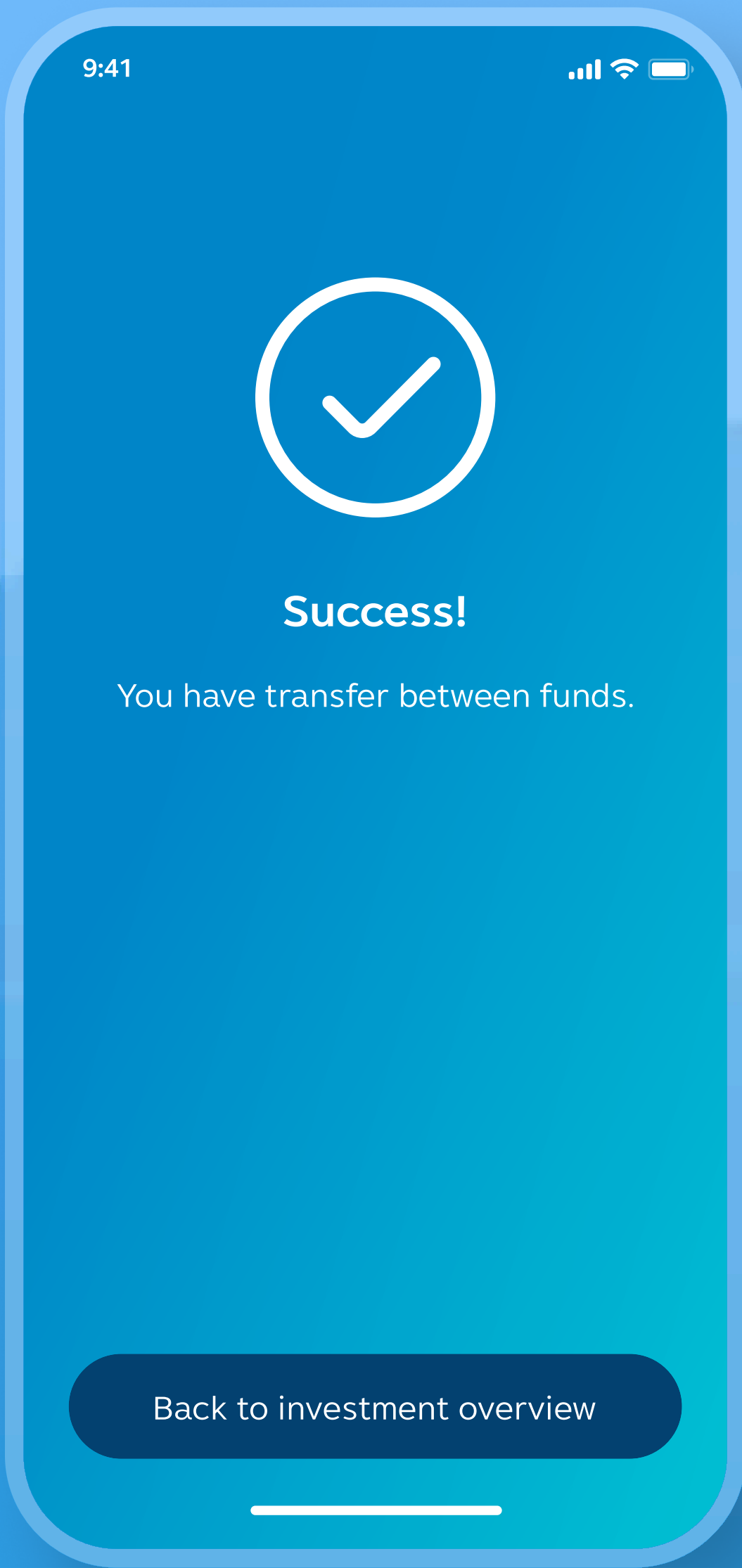
Transfer between funds



9. Review information and click “Confirm”



10. Verify OTP



11. Transfer between funds is complete



In alliance with  CIMB

โทร 026869595 www.principal.th

ผู้ร่วมลงทุนทำความเข้าใจลักษณะสินค้า (กองทุน) เงื่อนไขผลตอบแทน และความเสี่ยงก่อนตัดสินใจลงทุน/ผู้ลงทุนต้องศึกษาข้อมูลของกองทุนรวม โดยเฉพาะอย่างยิ่งนโยบายการลงทุนความเสี่ยงและผลการดำเนินงานของกองทุนรวมที่เปิดเผยไว้ในแหล่งต่างๆ หรือให้ขอข้อมูลจากเจ้าหน้าที่ก่อนตัดสินใจลงทุน ผลการดำเนินงานอดีตมิได้เป็นที่ยืนยันถึงผลการดำเนินงานในอนาคต