

# GROW with Singlife

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Client User Guide



# A. Trade Approval

1. Go to MySinglife | <https://mysinglife.singlife.com/account/login>

**Singlife** Products Promotions Make a claim About us Blog Support

Business Login

Create a Better Plan for your future that covers all your short and long-term financial goals. Get a S\$50 e-voucher\* w

# A Better Way to Financial Freedom.

Access former MyAviva/ MINDEF/ MHA/ POGIS customer portals

For Aviva customers, you can manage your profile and policies using the portals here.

**MySinglife (formerly known as MyAviva)**  
MySinglife is where Aviva customers can update their profile and view all plans.

**Log in**

**MINDEF Group Insurance Online**  
Manage policy details or upgrade your coverage for the MINDEF Group Insurance Scheme.

**Manage my policy**

**MHA Group Insurance Online**  
Manage policy details or upgrade your coverage for the MHA Group Insurance Scheme.

**Manage my policy**

**Public Officers Group Insurance Scheme Online**  
Manage policy details or upgrade your coverage for the Public Officers Group Insurance Scheme (POGIS).

**Manage my policy**

MySinglife (formerly MyAviva)/ MINDEF/MHA/POGIS portals

Singlife Portals and App

Corporate Customers

Financial Adviser Representative

## 2. Log in with **email** or **Singpass**

# Hello there!

Log in to your customer portal to view and manage your policies.

Log in with email


Or

Log in with singpass


Help


By logging in to MySinglife Customer Portal, you agree to our [Terms of Use](#) and [Privacy Policy](#).

### 3. Access Navigator account(s) via **Invest** tab





Dashboard

 Insure


 **Invest**


Explore


 Rewards


 Services


Account

 Support

 Profile

 Logout

 Hi, Client Name!

Cash SGD Plan 1 

Active Investment

Account No. NV0000000-001

[View details >](#)

## 4. Client can either click on **Admin** → **Customer Authorisation Queue** or **Pending Approval**

[Back to Home](#)
[Existing accounts](#)
[Customer](#)
[Admin](#)
[Research](#)

[Logout](#)

1.

Customer Authorisation Queue

2.

Client Name

Account Type: Individual

Account Code: NV0000000

Value:

\$8888.88

Reporting Currency:

SGD

Adviser:

[Edit](#)

Adviser Name

[Summary](#)
[Portfolio](#)
[Cash account](#)
[Account holders](#)
[Track Transactions](#)
[Reports & documents](#)
[Charges & remunerations](#)

My Details

Title	Ms
First Name	Client
Surname	Name
Date of Birth	01-Jan-1980
Race	Chinese
Preferred Phone Number	+65 91234567
Alternative Phone Number	
Email	clientname@email.com
Preferred Contact Method	E-Copy
Customer ID	88888
ID Number	S8812345A
FA Firm	Firm Name Pte Ltd

Edit

Transactions In Progress

Payments: >	In: 0 / Out: 0
Transfers: >	0
Deals: >	0

Work In Progress

Pending Approval: >


0

1.

### Take your investments **SRSly!**

Boost your nest egg and save on taxes by investing your SRS funds. Ask your financial adviser representative for more details.

5. Select **Click to review**



[Back to Home](#)[Existing accounts](#)[Customer](#)[Admin](#)[Research](#)

[Logout](#)

### Authorisation Queue

Date Started	Process	Account/Customer Id	Account/Customer Name	Action
30-Mar-2023	New Subscription Wizard	NV0000000	Client Name	<a href="#">Click to review</a>

<

Page

1

>

 of 1

## 6. Review the trade details:

- View **attached documents** (if any)
- Tick on **Declaration** checkbox
- Click **Authorise**

Documentation

Document sub category	File upload	Document Name	Actions
Investment Transaction	Supporting Document.docx	Supporting Document	View ✓ 1.
Investment Transaction	Choose File No file chosen		

+

 Add comment

+

 Add recommendation comment

Declaration

2.

☒ I declare and confirm that :

- My adviser has explained the **Navigator Investment Account Terms and Conditions (T&Cs)** to me, I have read and understood the T&Cs and am aware that a copy of the T&Cs can be downloaded from the embedded link;
- My adviser has :
  - provided a recommendation on the transaction in this application having regard to my investment objectives, financial situation and particular needs;
  - provided and explained the relevant product information and disclosures to me;
  - advised me that all requirements set out in the Securities and Futures Act (Cap. 289), Financial Advisers Act (Cap. 110) and any other applicable law have been met; and
  - verified that I am eligible to subscribe for the Fund(s);
- Navigator Investment Services Limited makes no representation or warranty that any uploaded attachments or content are accurate, complete, or authentic.

Exit

< Previous step

Return to Authorisation Queue

Reject


3.

Authorise



## B. Update Email Address

# 1. Click on **Client Name**


[Back to Home](#)

[Existing accounts](#)
[Customer](#)
[Admin](#)
[Research](#)

[Logout](#)

Client Name

Account Type: Individual  
 Account Code: NV0000000

Value:  
**\$8888.88**

Reporting Currency:  
 SGD

Adviser:  
 Adviser Name

[Summary](#)
[Portfolio](#)
[Cash account](#)
[Account holders](#)
[Track Transactions](#)
[Reports & documents](#)
[Charges & remunerations](#)

# 2. Click on **Details → Contact details**

[Summary](#)
[Details](#)

[Customer details](#)
[Regulatory](#)
[Addresses](#)
[Contact details](#)
[Suitability](#)
[Client documents library](#)

# 3. Under **Email**, click **Edit**

Email

Email Type	Email Address	Action
Personal	clientname@email.com	<a href="#">Edit</a> <a href="#">Remove</a>

Add new

#### 4. Input new email address and click **Save email**

Email

Email Type	Email Address	Action
Personal	clientname@email.com	<div>1.</div> <div>Edit Remove</div>

Email Type

Personal ▾

Email Address

clientname@newemail.c

Confirm Email

clientname@newemail.c

Cancel

Save email >

2.

Add new

#### 5. Click **Update customer**

Phone numbers

Phone Type	Country	Area Code	Number	Action
Mobile	Singapore +65		91234567	Edit Remove


3.

Update customer >

Add new

# C. Update Contact Number

# 1. Click on **Client Name**


[Back to Home](#)

[Existing accounts](#)
[Customer](#)
[Admin](#)
[Research](#)

[Logout](#)

Client Name

Account Type: Individual

Account Code: NV0000000

Value:

\$8888.88

Reporting Currency:

SGD

Adviser:

Adviser Name

[Edit](#)

[Summary](#)
[Portfolio](#)
[Cash account](#)
[Account holders](#)
[Track Transactions](#)
[Reports & documents](#)
[Charges & remunerations](#)

# 2. Click on **Details → Contact details**

[Summary](#)
[Details](#)

[Customer details](#)
[Regulatory](#)
[Addresses](#)
[Contact details](#)
[Suitability](#)
[Client documents library](#)

# 3. Under **Phone numbers**, click **Edit**

Phone numbers

Phone Type	Country	Area Code	Number	Action
Mobile	Singapore +65		91234567	<a href="#">Edit</a> <a href="#">Remove</a>

# 4. Input new contact number and click **Save phone**

Phone numbers

Phone Type	Country	Area Code	Number	Action
Mobile	Singapore +65		91234567	<div>1.</div> <div>Edit Remove</div>

Phone Type

Mobile ▾

Country

Singapore +65 ▾

Area Code

Number

87654321

Cancel

Save phone >

2.

Add new

# 5. Click **Update customer**

Phone numbers

Phone Type	Country	Area Code	Number	Action
Mobile	Singapore +65		87654321	Edit Remove


Add new

3.

Update customer >

# D. Update Address

# 1. Click on **Client Name**


[Back to Home](#)

[Existing accounts](#)
[Customer](#)
[Admin](#)
[Research](#)

[Logout](#)

Client Name

Account Type: Individual

Account Code: NV0000000

Value:

\$8888.88

Reporting Currency:

SGD

Adviser:

Adviser Name

[Edit](#)

[Summary](#)
[Portfolio](#)
[Cash account](#)
[Account holders](#)
[Track Transactions](#)
[Reports & documents](#)
[Charges & remunerations](#)

# 2. Click on **Details → Addresses**

[Summary](#)
[Details](#)

[Customer details](#)
[Regulatory](#)
[Addresses](#)
[Contact details](#)
[Suitability](#)
[Client documents library](#)

# 3. Under **Address**, click **Edit**

Address Type	Country	Unit Number	Building Name	Block/Street Number	Street Name	Postcode	Action
Primary Residential	Singapore	#08-008		888B	Old Street Name	800008	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Show</a>



4. Input new address and click **Save phone**

Address Type	Country	Unit Number	Building Name	Block/Street Number	Street Name	Postcode	Action
Primary Residential	Singapore	#08-008		888B	Old Street Name	800008	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Show</a>

1.

Add address

Update customer >

3.

Address Type \*

Primary Residential ▾

Country \*

Singapore ▾

Postcode \*

88888888

Find

Block/Street Number \*

888A

Street Name \*

Street Name

Unit Number

#08-888

Building Name

Cancel

Save address >

2.

5. Click **Update customer**

6. To upload **proof of address**, click on **Details** → **Client documents library**

Summary

Details

Customer details

Regulatory

Addresses

Contact details

Suitability

Client documents library

7. Click on **Add new**

Search

Customer Document:

All

Document Sub category:

All

Archive status

All

Search >

Add new document:

Add new

## 8. Change **Document Sub category** to **Proof of Address** → Click on **Choose File**

Add Document

Customer ID: 71098

Document category: Customer DocumentCategory A ▼

Document Sub category: Proof of Address ▼

Archive status: Checked In ▼

File: Choose File No file chosen

Document Name:

Cancel Save document >

## 9. Click **Save document**

# E. Update Preferred Contact Method

# 1. Under client **Summary** → **My Details** → Click **Edit**

Client Name

Account Type: Individual

Account Code: NV0000000

Value:

\$8888.88

Reporting Currency:

SGD

Adviser:

Edit

Adviser Name

Summary

Portfolio

Cash account

Account holders

Track Transactions

Reports & documents

Charges & remunerations

My Details

Title

Ms

First Name

Client

Surname

Name

Date of Birth

01-Jan-1980

Race

Chinese

Preferred Phone Number

+65 91234567

Alternative Phone Number

Email

clientname@email.com

Preferred Contact Method

E-Copy

Customer ID

71098

ID Number

S8812345A

FA Firm

Firm Name Ptd Ltd

Edit

Transactions In Progress

Payments: >

In: 0 / Out: 0

Transfers: >

0

Deals: >

0

Work In Progress

Pending Approval: >

0



Take your investments **SRSly!**

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Internal

## 2. Click on **Account holders** → **Contact details**

Summary	Portfolio	Cash account	<b>Account holders</b>	Track Transactions	Reports & documents	Charges & remunerations
Account details	<b>Contact details</b>	Banking details	Account structure	Associated accounts	Roles	

## 3. Under **Contact Preferences**, click **Edit**

Contact Preferences		Edit
Allowed E-Copy	Yes	
Allowed Post	Yes	
Preferred Contact Method	E-Copy	
Is Correspondence Recipient	No	

## 4. Select **Preferred Contact Method**, click **Save**

Contact Preferences		Cancel	Save >
Allowed E-Copy	Yes		
Allowed Post	Yes		
Preferred Contact Method	E-Copy ▼		
Is Correspondence Recipient	<input type="checkbox"/>		