

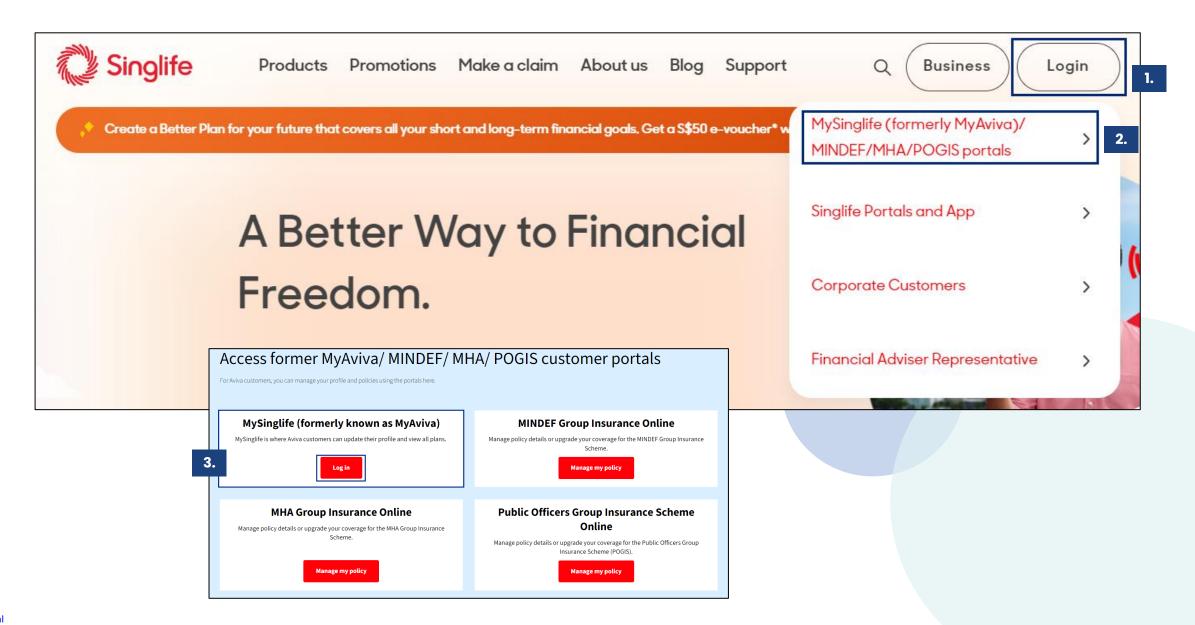


A. Trade Approval





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

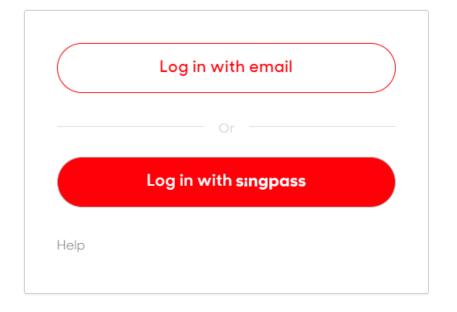




2. Log in with **email** or **Singpass**

Hello there!

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

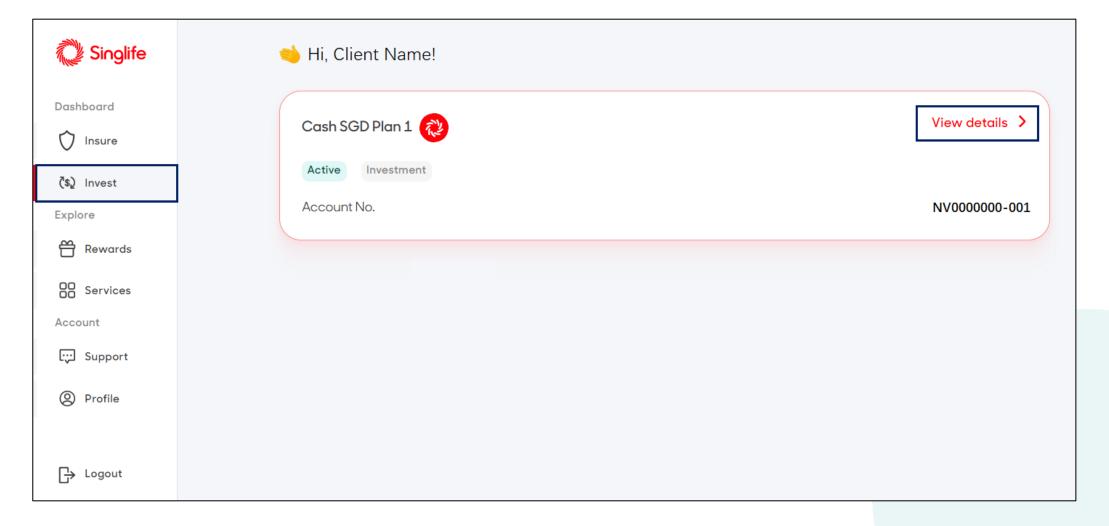


By logging in to MySinglife Customer Portal, you agree to our <u>Terms of Use</u> and <u>Privacy Policy</u>.





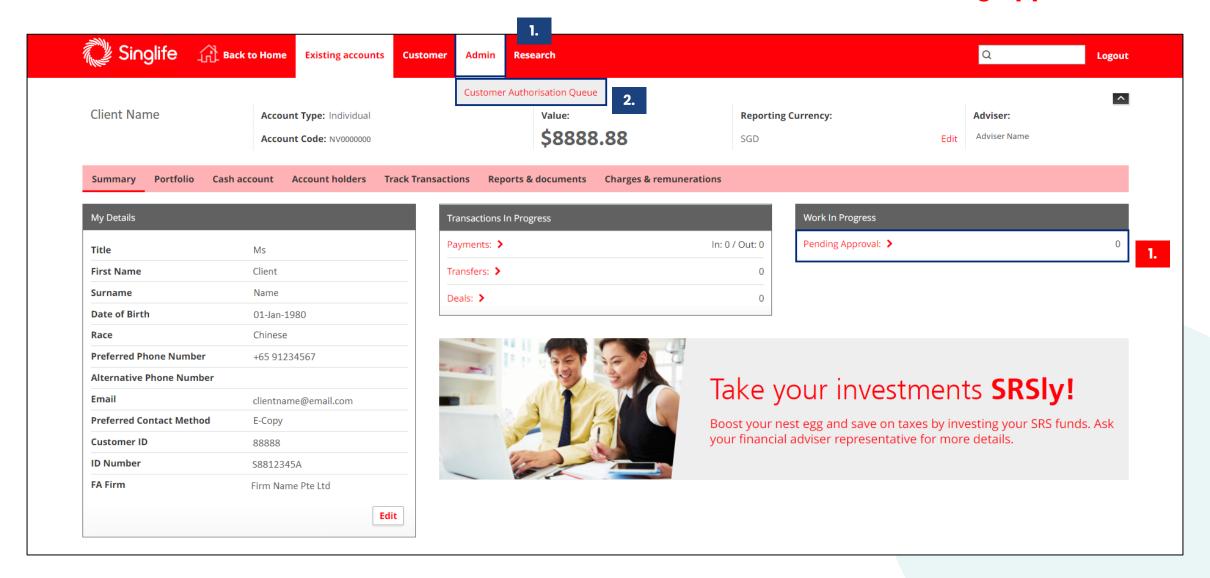
3. Access Navigator account(s) via **Invest** tab



Internal

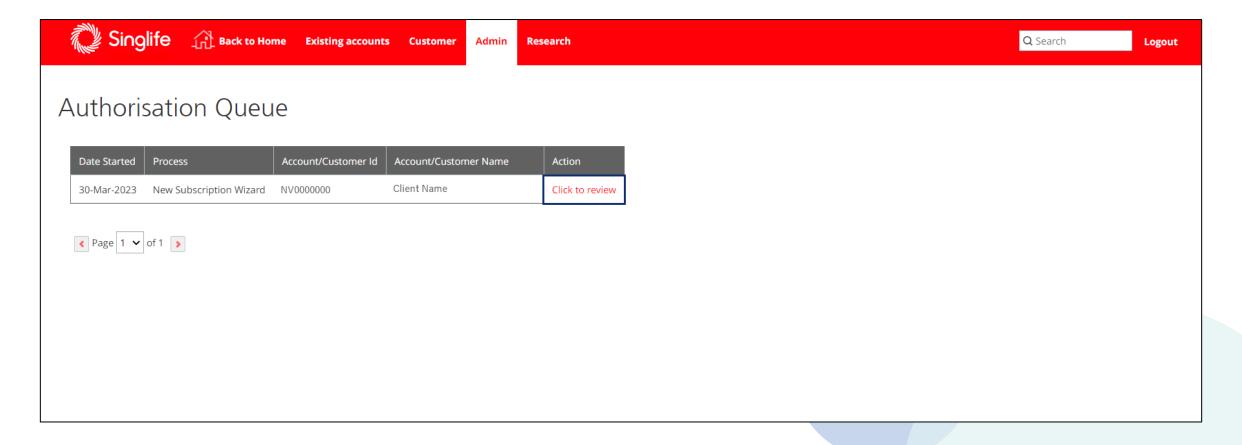


4. Client can either click on **Admin** → **Customer Authorisation Queue** or **Pending Approval**





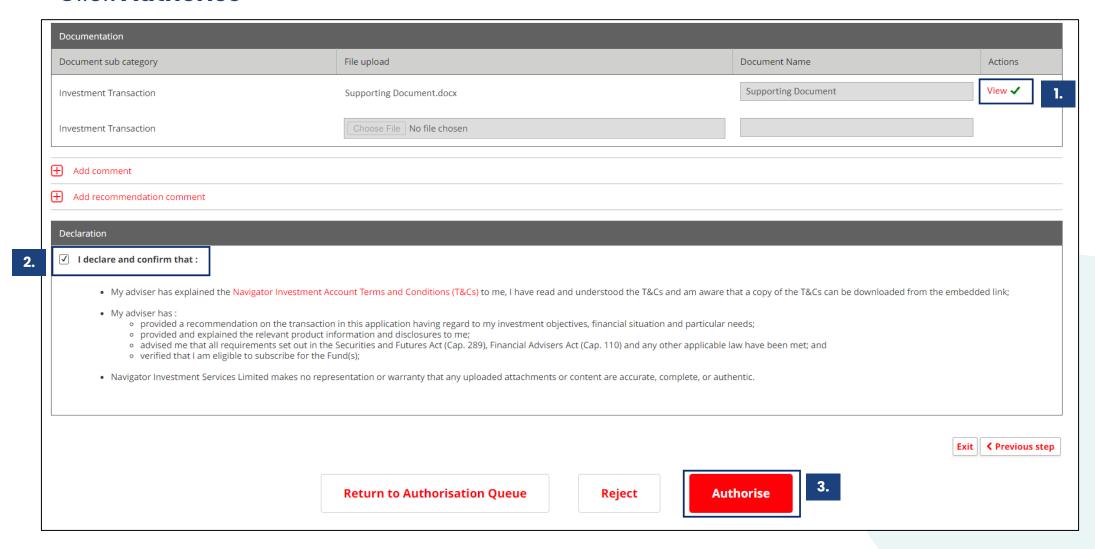
5. Select Click to review





grow with Singlife

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





B. Update Email Address

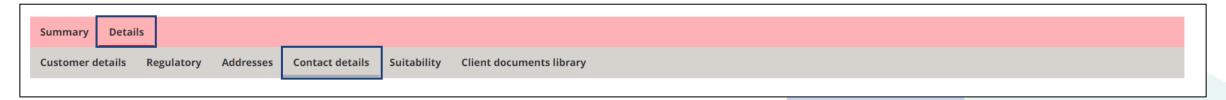




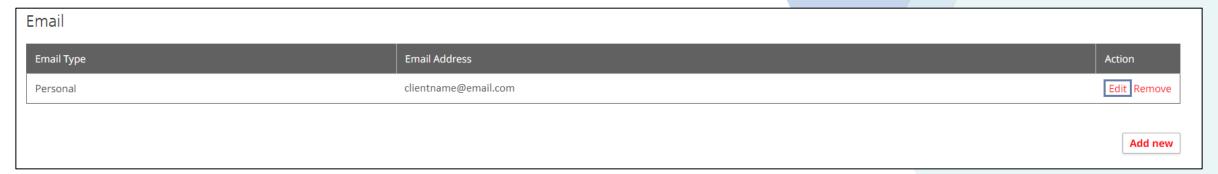
1. Click on Client Name



2. Click on **Details** \rightarrow **Contact details**

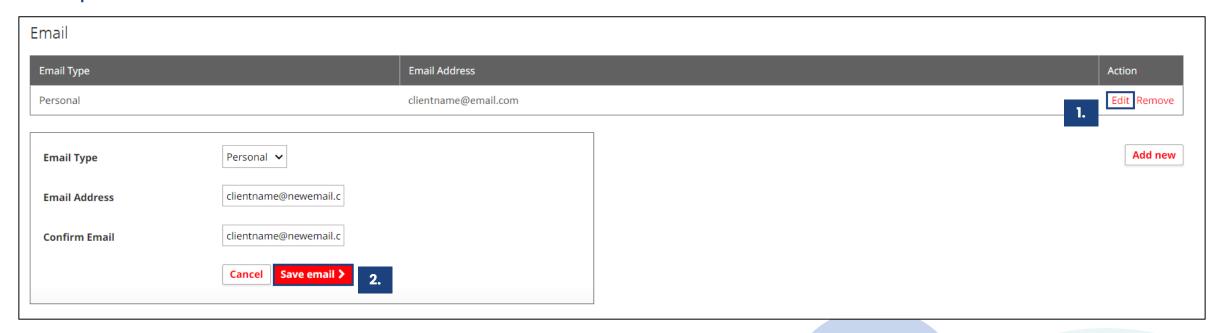


3. Under **Email**, click **Edit**

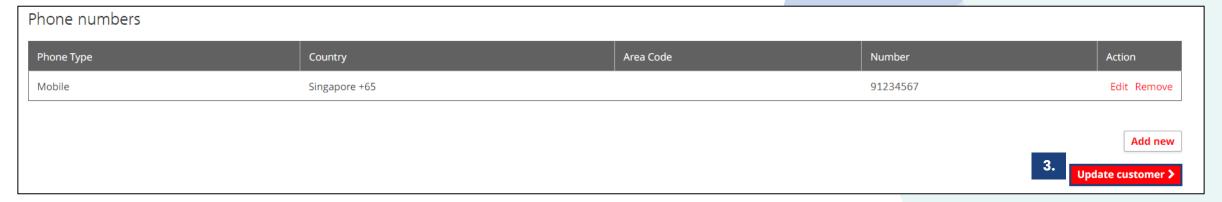




4. Input new email address and click Save email



5. Click **Update customer**





C. Update Contact Number

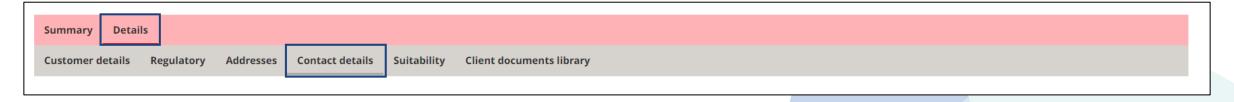




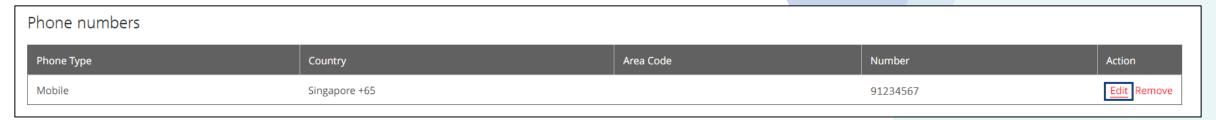
1. Click on Client Name



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

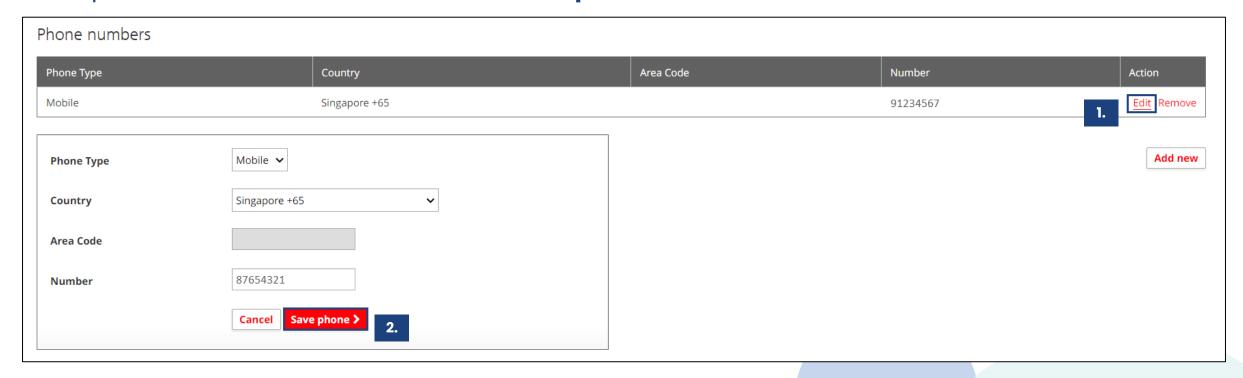


3. Under **Phone numbers**, click **Edit**

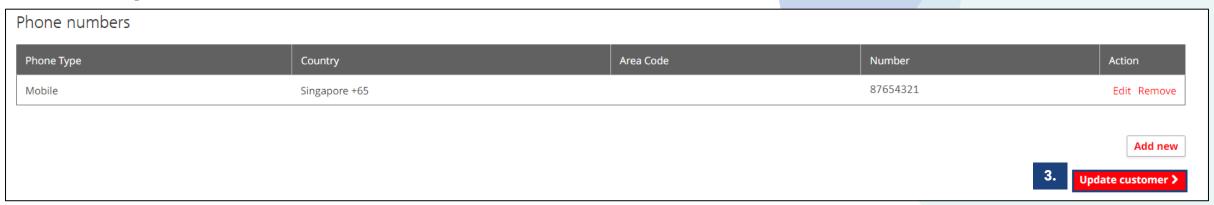




4. Input new contact number and click **Save phone**



5. Click **Update customer**





D. Update Address

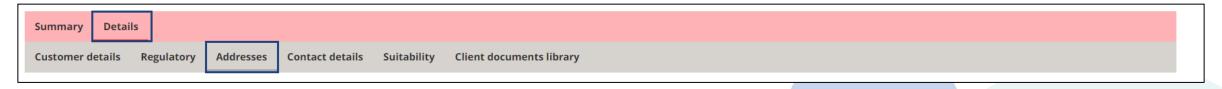




1. Click on Client Name



2. Click on **Details** → **Addresses**



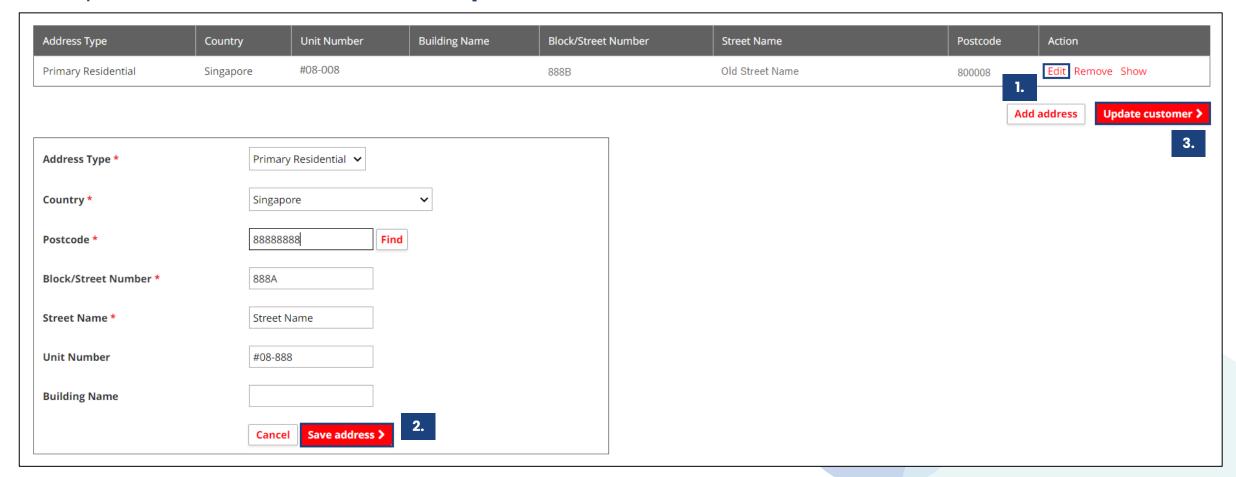
3. Under Address, click Edit

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

Internal



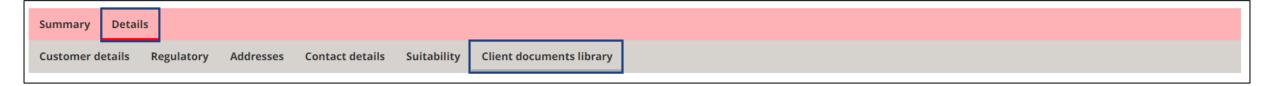
4. Input new address and click **Save phone**



5. Click **Update customer**



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

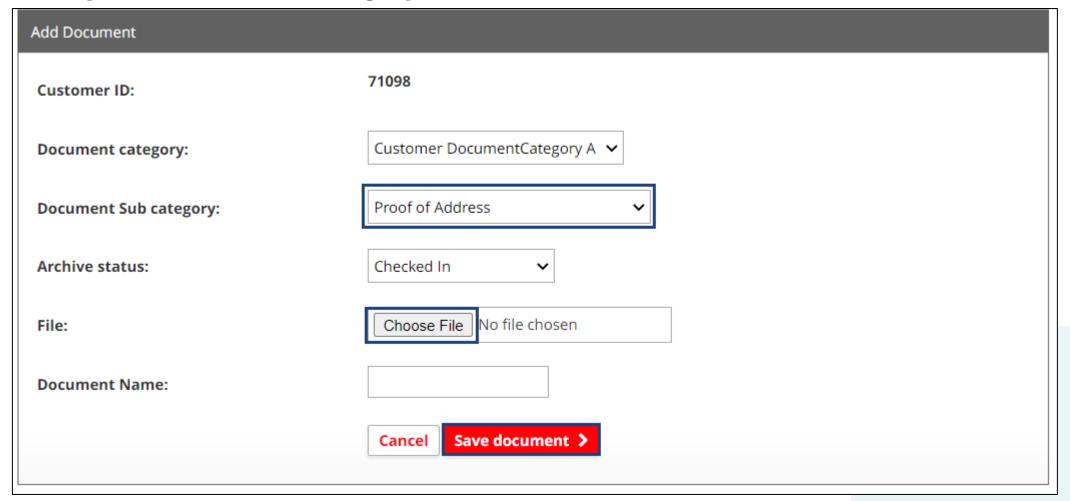


7. Click on Add new





8. Change Document Sub category to Proof of Address -> Click on Choose File



9. Click Save document

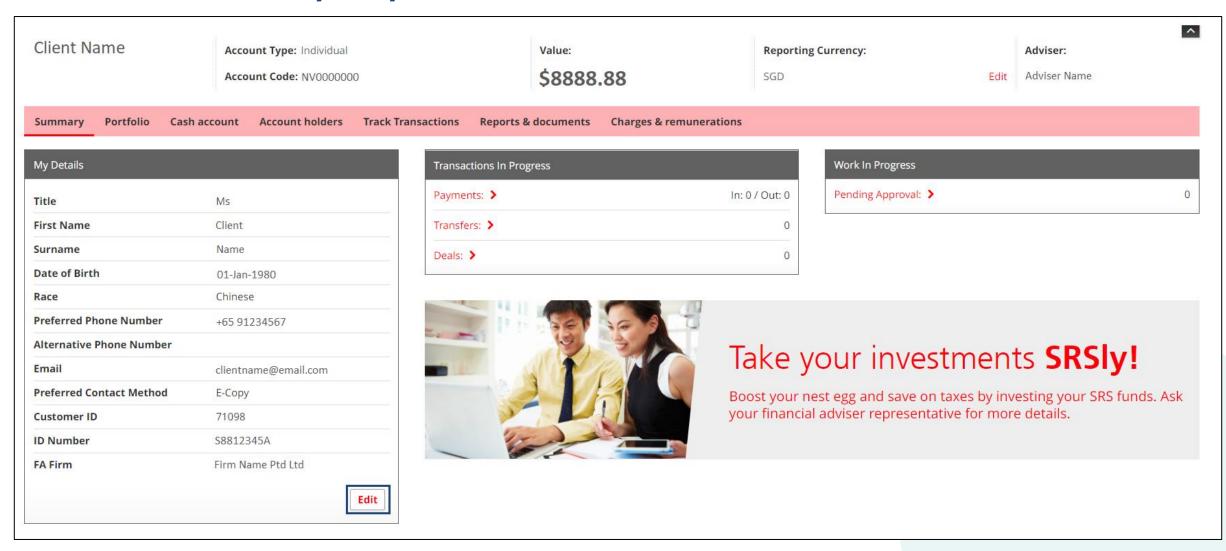


E. Update Preferred Contact Method



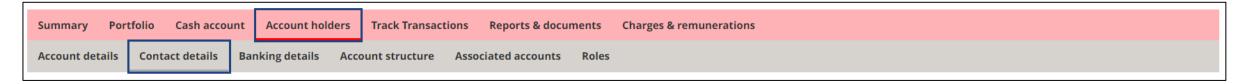


1. Under client **Summary > My Details >** Click **Edit**

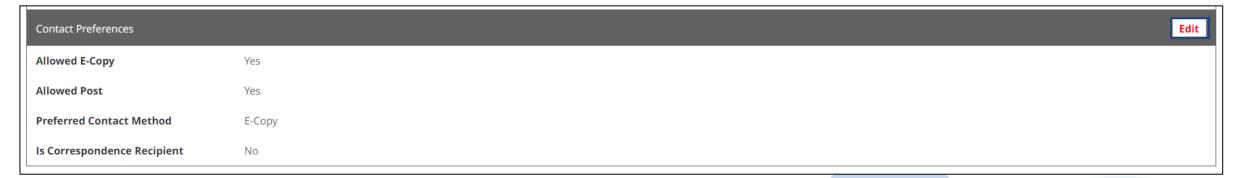




2. Click on Account holders -> Contact details



3. Under Contact Preferences, click Edit



4. Select Preferred Contact Method, click Save

