

Credit Suisse Wealth Management APAC app

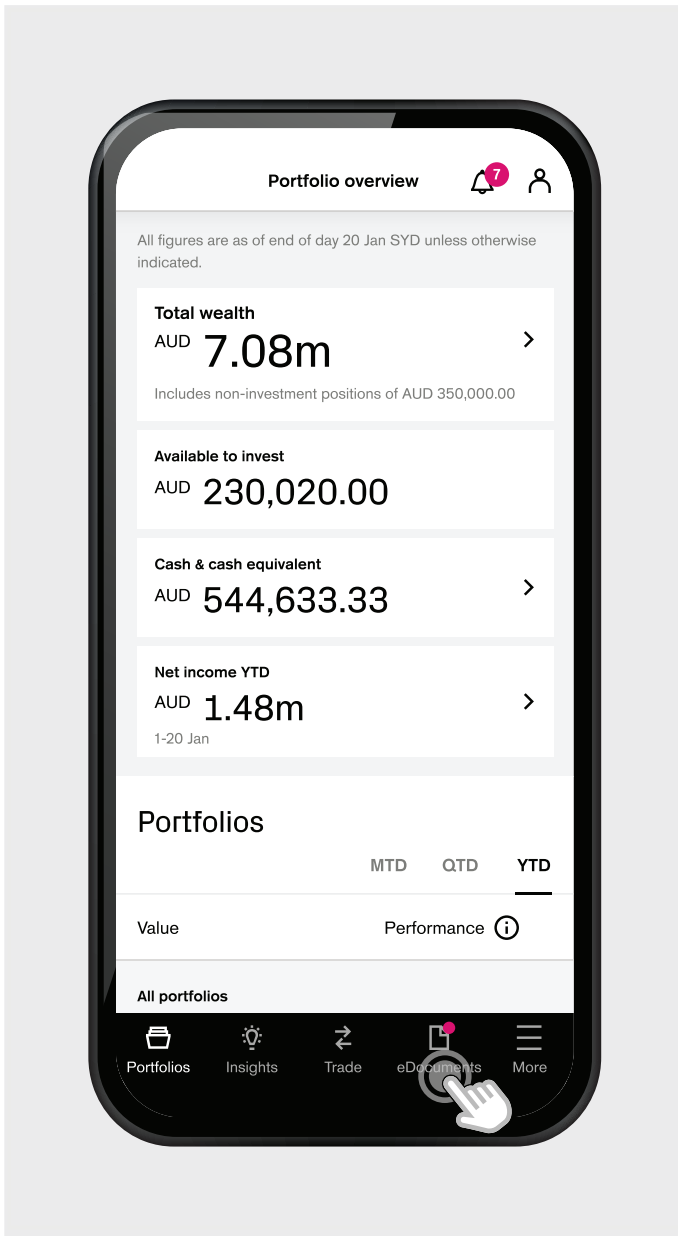
Consolidated Investment Statements



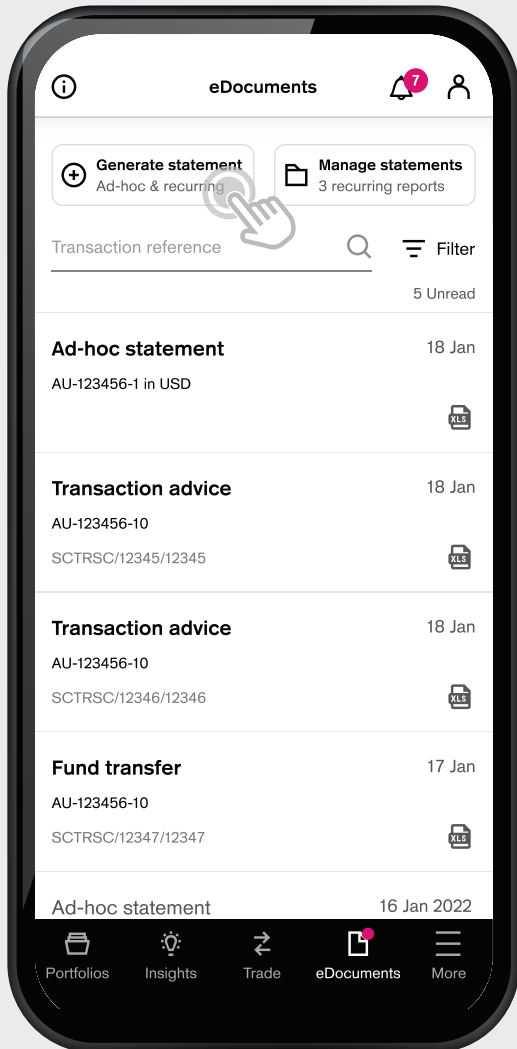
In this guide, we introduce the the Consolidated Investment Statement ordering capability which is available via the Credit Suisse Wealth Management APAC app.

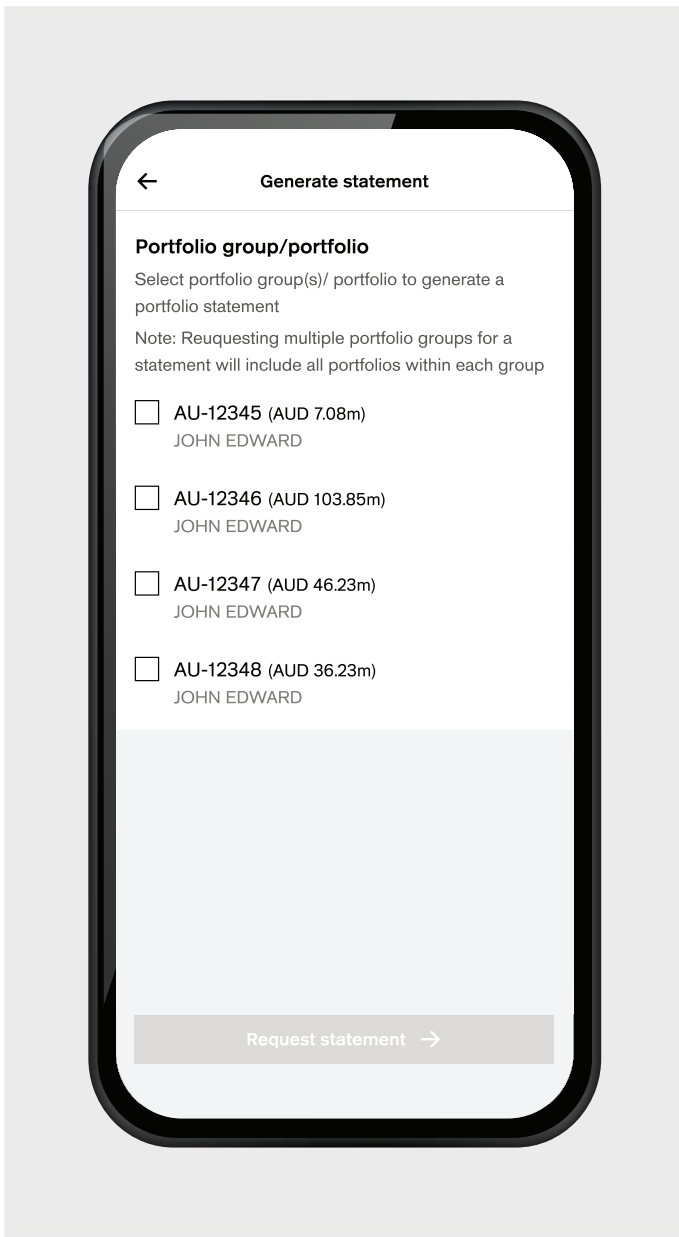
Create a Consolidated Investment Statement

Step 1: Upon login, tap "eDocuments" from the main navigation bar.



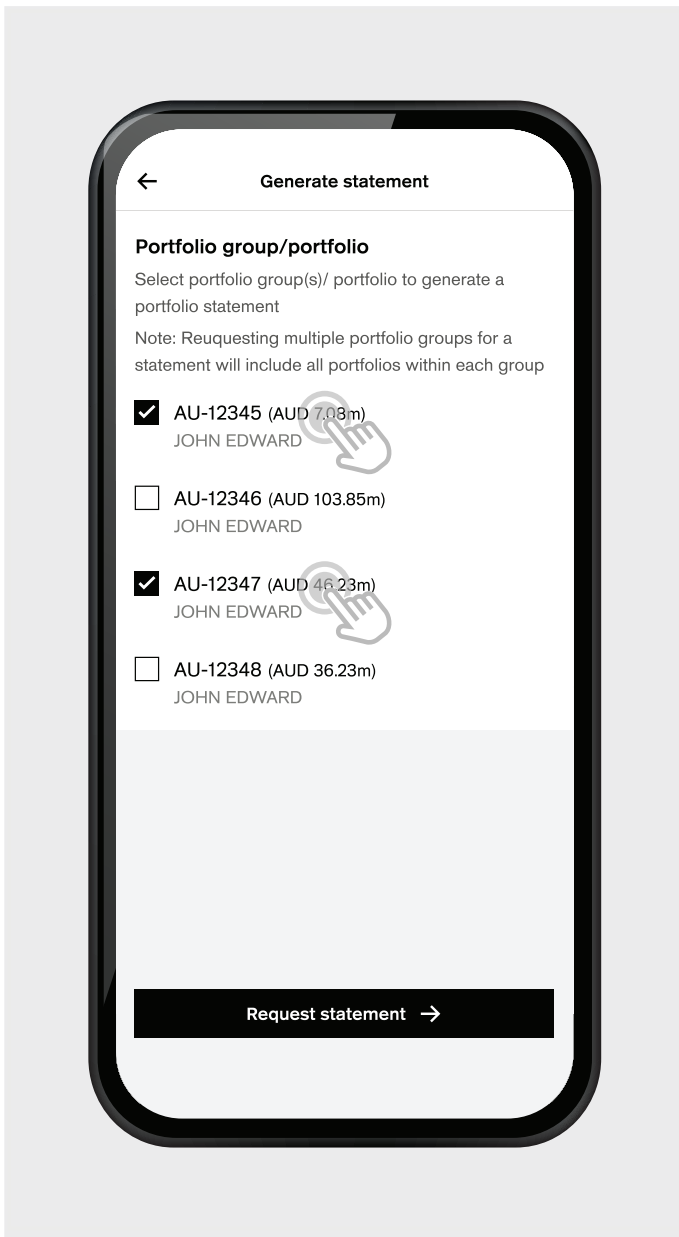
Step 2: Tap on the "(+) Generate statement" button.

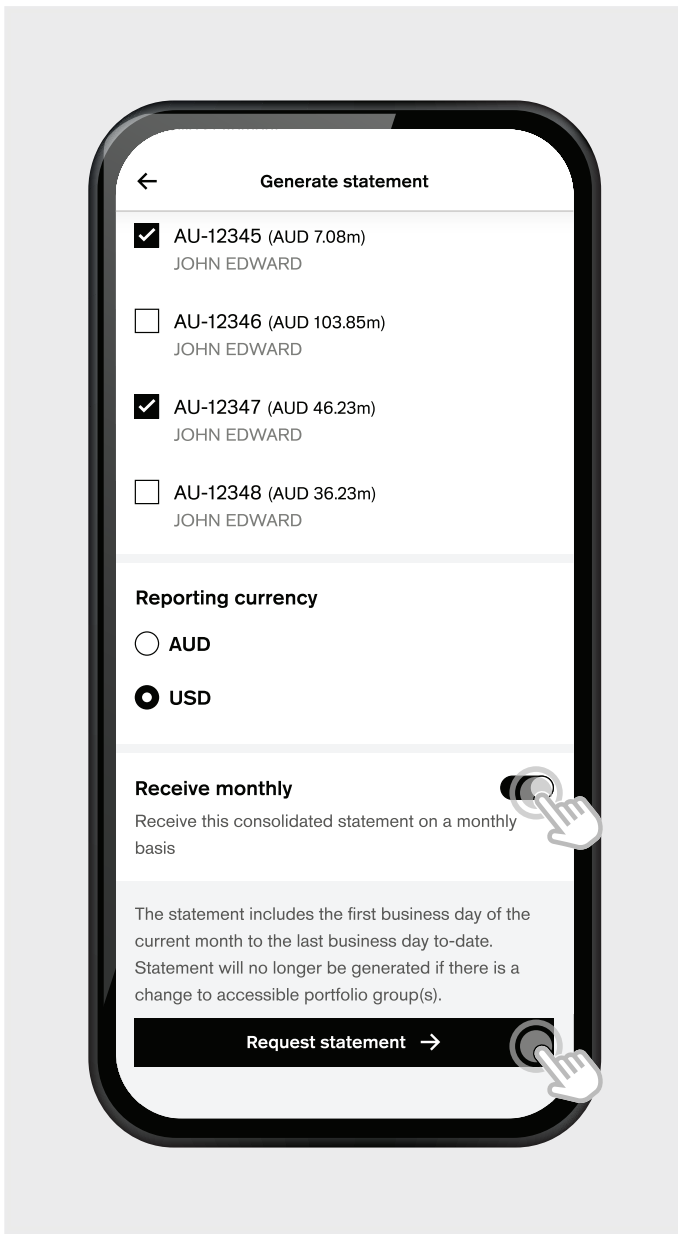




Step 3: A list of all available portfolio groups accessible via the App will be displayed.

Step 4: Select the portfolio groups you wish to include in your consolidated statement.





Step 5:

a) To receive the consolidated statement on a monthly basis, tap "Receive monthly".

Otherwise, the statement will remain as an ad hoc consolidated statement request.

b) You may also change your notification preference for consolidated statement's in "Notification settings".

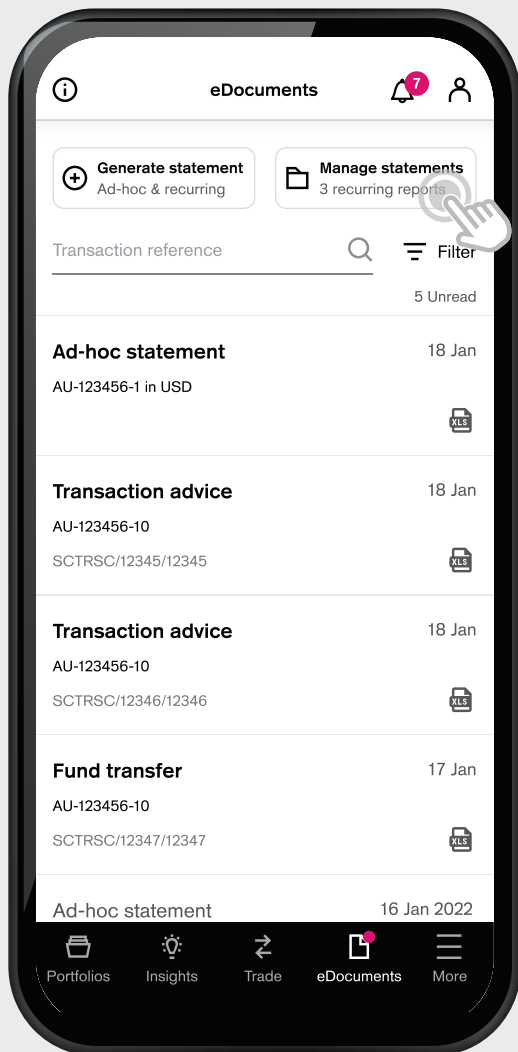
Step 6: Tap "Request Statement" to proceed.

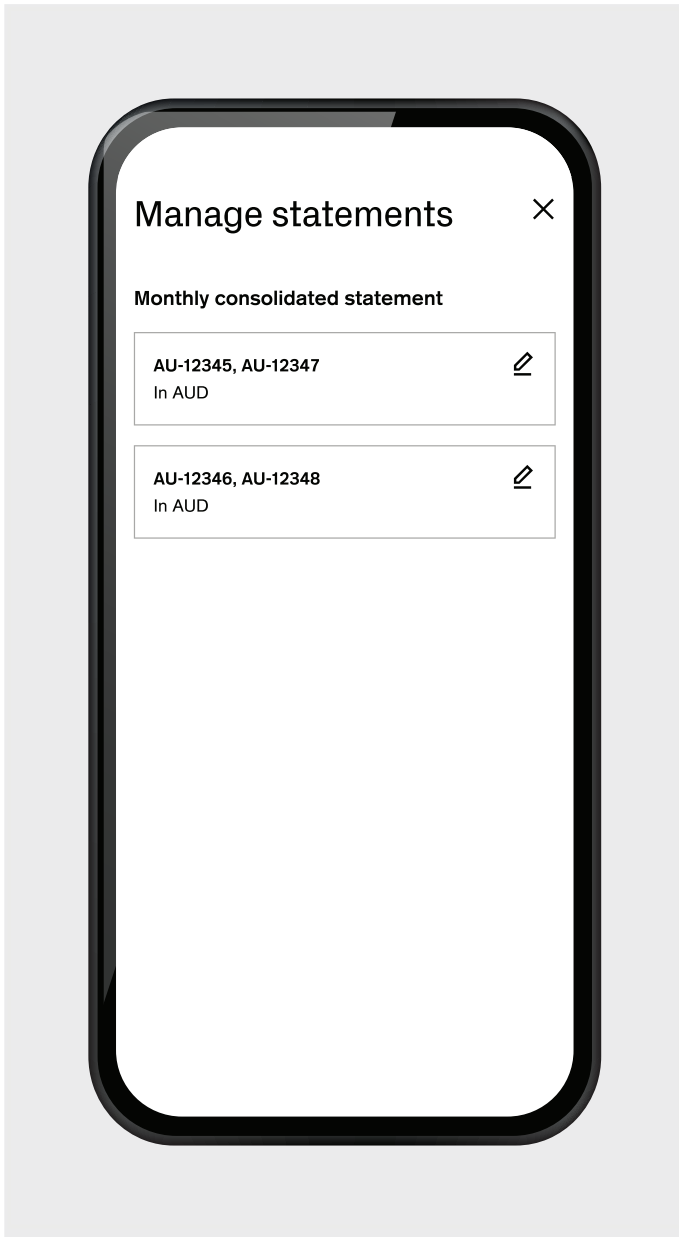
Step 7: Your requested statement will be generated within 10-20 minutes and accessible on the eDocuments landing page.

Manage your Consolidated Investment Statement(s)

To manage your monthly consolidated statements, navigate to eDocuments within the App.

Select “Manage statements”.





You can choose to either delete or edit your previously created consolidated statements.

For more information, contact our Customer Care Center via email or phone. Alternatively, your Relationship Manager remains available to you.

Email us: apac.app@credit-suisse.com

Call us:

1800 65 9902 (within Australia)

+612 8205 5902 (outside Australia)

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