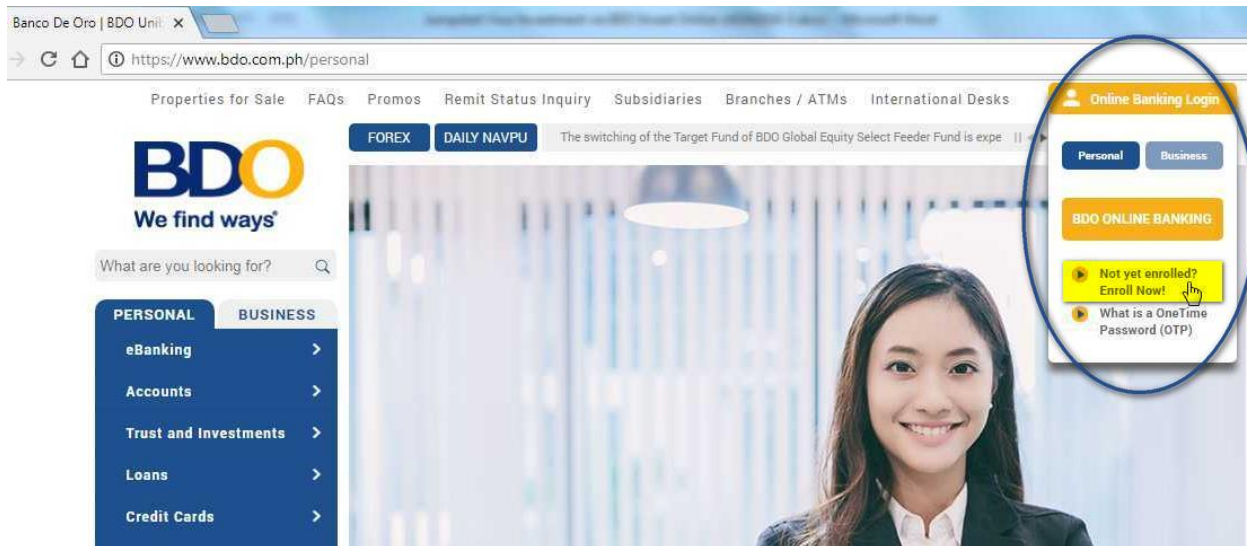


# Jumpstart Your UITF Investment

## A Guide To Investing Through BDO Invest Online

1. First, log in to your *BDO Online Banking* account.

No BDO Online Banking account? Simply go to [www.bdo.com.ph](http://www.bdo.com.ph), look for the Online Banking button on the upper right corner, and follow the enrollment procedure.



2. With your BDO Online Banking account, start investing online by following these steps:

- Go to **"My Accounts"**
- Click **"My Trust Account / Invest Online"**
- Click **"Transaction"**

3. Choose **"Regular UITF Subscription"** if you want to make a direct investment to any BDO UITFs. If you want to set your financial journey on autopilot, choose **"EIP Contribution/ Unsubscription"**

Please note that for first-time UITF investors, a representative from BDO Trust and Investments Group (TIG) will call you within two (2) banking days to explain and ensure that you understand your risk profile and the risks involved in investing in the UITFs.

4. Answer the *Investor Profile Questionnaire (IPQ)/Client Suitability Assessment (CSA)* to find out what kind of investor you are and which UITFs could best suit your investment style.

5a. If you decide to make a direct investment, select the UITF you would like to invest in and read the following documents that will help you understand the UITF/s you are investing in as well as the risks involved:

- *Client Investment Suitability (CIS) /Investment Policy Statement (IPS)*
- *Risk Disclosure Statement (RDS)*
- *Omnibus Participating Trust Agreement (OPTA)*

After you have read each document, click on the “*I Accept*” button to signify your agreement and choose your deposit account where funds will be drawn to make your investment.

5b. For EIP participants, input the following in your contribution details.

- **Fund**
- **Amount per Contribution** – minimum of PHP1,000/USD200
- **Frequency** – Once or Twice a Month
- **Day(s) of Contribution** – 5<sup>th</sup>, 10<sup>th</sup>, 15<sup>th</sup>, 20<sup>th</sup>, 25<sup>th</sup>, 30<sup>th</sup>
- **Contribution Starts On** – First Contribution Date
- **Account Number** – Savings or Checking Account where your funds will be automatically debited.

6. Do not forget to check the details before you click *Submit*.

## CONGRATULATIONS, YOU ARE NOW AN INVESTOR!

### How was your online investing experience?

Did you find this document helpful in your efforts to begin investing? Did it serve as a friendly and accurate guide? Email us at [investments@bdo.com.ph](mailto:investments@bdo.com.ph) with the subject: INVEST ONLINE JUMPSTART FEEDBACK. Your comments, suggestions, and questions are most welcome.

Thank you!