

New Pension Scheme for Private Schools Faculties

Operating Manual of Member's Choice Platform

Corporate Trust Dept.



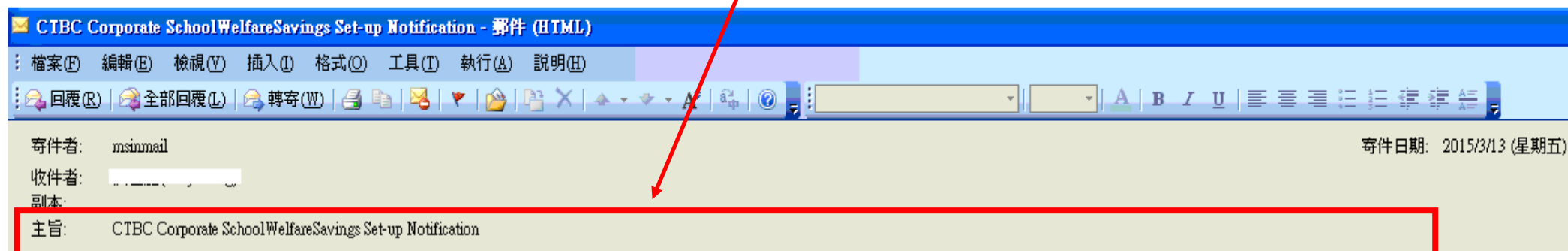
中國信託銀行
CTBC BANK

Step 1. Register

Receive “Verification Letter” by Email

❖ Content of “Verification Letter”

① Open “CTBC Bank Corporate Trust Account Set-up Notification”



The screenshot displays the content of the verification letter. At the top left is the CTBC Bank logo and name. The main text includes a welcome message and instructions to click a link and provide a verification number and birthday. A red box highlights the second step header, and a red arrow points to the verification number in the text. Another red arrow points to the link in the text.

Your specific “verification number”

Welcome to join the Trust Website of CTBC !

Please click the link, https://192.168.29.35:8943/tbs/mf/user/New_School_User_Authentication.jsp, and then enter your **ID Number** and **verification number**(58p013) and **Birthday** to set up your **User ID** and **Password**.

② After you completed the set up, please go back to the Trust website, <https://192.168.29.35:8943/tbs/en/index.jsp>, you will see the log-in section in the right side of that page. Please enter your **ID Number**, **User ID** and **Password** to log in Trust website to start our service.

Best Regards,

Click the link.

CTBC Commercial Bank as Trustee of New Pension Scheme for Private School Faculties

Register(2/3) : Process account verification



中國信託銀行
CTBC BANK

CTBC Trust Online Banking Account Verification

Please insert the following information then click "Submit" then you will go on to next page to set up your own "User ID" and "Password"

ID	<input type="text"/>
Verification Number	<input type="text"/>
Birthday	<input type="text"/> Year <input type="text" value="1"/> <input type="text" value="1"/> Month <input type="text" value="1"/> <input type="text" value="1"/> Day

Please insert the 6 digits or characters in combination which is given by the verification letter

Please insert your birthday. Example 1999/11/01

Submit

Clear

1. Enter your "ID Number"
2. Enter your "Verification Number"
3. Enter your "Date of Birth"
4. Click "Submit"

Set up User ID and Password



CTBC Trust Online Banking Account Verification

Please insert the following information then click "Submit" then you will go on to next page to set up your own "User ID" and "Password"

User ID

Please use 6 to 12 digits or characters in combination to set up your User ID.

Please Confirm

Password

Please use 6 to 12 digits or characters in combination to set up password.

Please Confirm

1. Set up your "User ID" and confirm
2. Set up your "Password" and confirm
3. Click "Submit"

Step 2. Log In

Log In

❖ You can scan the QR Code or click the linkage as following to log in the website:

https://ecorp.ctbcbank.com/cts/school_login/index.jsp



The screenshot shows the login interface for the Private School Fund Management Committee's online service. The page title is "Online Service" and it includes fields for ID, User ID, Password, and Verify Code. A "LOGIN" button is present, along with a "RESEND" button and a "Help Me" link. The page also features a "CLIENT SERVICES" section with contact information.

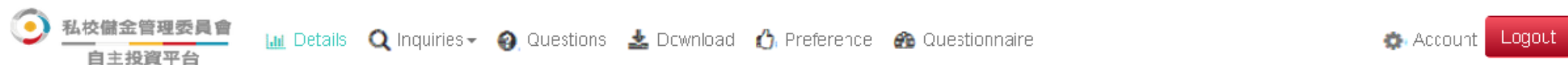
1 → Insert "ID", "User ID" and "Password"

2 → Click "LOG IN"

3 → You can find Q&A as clicking "Help Me"

Choose Account

❖ You can click any account you own to inquiry the details



Current account value
NT\$ 975,654

Faculty Savings Trust Account	NT\$ 799,290
Additional Contribution Trust Account	NT\$ 176,364

Please click the "Account" if you would like to inquiry account details or transfer portfolios.

4 → Choose Account

Our client service time is: Weekday 9:00-17:30 / E-banking and Accounts Inquiries 02-2558-0128 / Investment Consulting 0800-898-558 / Fund Management Committee for Private Schools Faculties 02-2396-2880

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Site Map

❖ You can choose the services as following you would like to use.

私校儲金管理委員會
自主投資平台

[Details](#) | Inquiries | Questions | Download | Preference | Questionnaire

Account | Logout

Investment Performance Overview

Up to 2017/8/23

Portfolio	Accumulated Investment Amounts	Present Value	Profits and Losses	Rate of Return	Investment Details	Member's Choice	Performance Management	Investment Adjustment
Lifecycle Portfolio 036-040	14,473	10,507	-3,866	-26.71%	Inquiry	Change	Setting	Transform
Conservative Portfolio	1,035,897	1,015,886	-20,011	-1.93%				
Stable Portfolio	2,831	1,881	-950	-33.55%				
Aggressive Portfolio	2,734	2,128	-606	-22.16%				
SUBTOTAL	1,055,935	1,030,502	-25,433	-2.4%				

NOTE (Click the note description)

Our client service time is Weekday 9:00-17:30 / E-banking and Accounts Inquiries 02-2558-0128 / Investment Consulting 02-2706-0759(pst@mail.ctfund.com.tw) / Fund Management Committee for Private Schools Faculties 02-2396-2880

6 Back to "Details"

Others

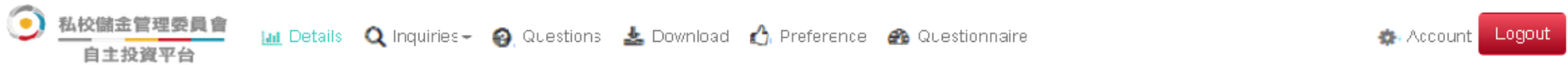
5 Frequent Functions

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Step 3. Frequent Functions

Inquiries (1/2)

❖ You can inquire the investment details within the period.



Faculty Savings Trust Account / Investment Details

Back

Inquiry Time: 3 Month | 6 Month | 1 Year | **Period**

2015-10-13 -- 2016-10-13

Inquiry The period must be within a year

Download

Important Reminder

The accumulated amounts and accumulated units shown on this web page are for reference only. The amounts you can withdraw will be in accordance with the bookkeeping records of CTBC Bank based on the contract of "Retirement, Compensation, Resignation and Severance Fund Management Committee for Teachers and Staff of Private School Consortium Corporations of the Republic of China".

The value date of investment and redemption is 17th of each month (for public holiday, will be delayed to the immediately working day).

Our client service time is Weekday 9:00-17:30 / E-banking and Accounts Inquiries 02-2558-0128 / Investment Consulting 0800-898-558 / Fund Management Committee for Private Schools Faculties 02-2396-2880

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only.

Inquiries (2/2)

❖ You can download the investment details.

From:2017-05-08 ~ To:2017-08-08

Contributions

Value Data	School	Contributed by Faculties	Contributed by School	Contributed by Authority	Remainders from School's Contribution	Sum
2018-01-02	TRUST	500	500	500		01,500
2018-01-02	TRUST	500	500	500		01,500
Sum		1,000	1,000	1,000		03,000

Investments

Value Data	Portfolio	Contribution Amounts	Investment Prices	Investment Units
2018-02-01	Conservative Portfolio	96	15.1	6.49
2018-01-17	Stable Portfolio	2,831	15.2	186.25
2018-01-02	Lifecycle Portfolio 036-040	1,500	12.4895	120.101
2018-01-17	Lifecycle Portfolio 036-040	3,676	15.2	241.842
2018-02-01	Lifecycle Portfolio 036-040	22	15.2	1.448
2018-01-17	Aggressive Portfolio	2,734	13	210.308
2018-01-01	Lifecycle Portfolio 036-040	9	10.1895	0.783
2018-01-02	Lifecycle Portfolio 036-040	1,500	14.1895	105.867
2018-01-17	Lifecycle Portfolio 036-040	3,875	13	298.077
2018-02-01	Lifecycle Portfolio 036-040	12	13	0.924
Sum		16,257		

Redemptions

Value Data	Portfolio	Redemption Amounts	Redemptions Price	Redemption Units	Transform fee	Redemption net amount
2018-01-17	Conservative Portfolio	11,326	15.1	750	60	10,726
2018-01-01	Lifecycle Portfolio 036-040	9	10.4895	0.752	6	3

- 1.If you apply for “investment adjustment” over 2 times per year in Faculty Saving Account will be charged NT\$200.
- 2.Additional Saving Account and Pending Withdraw Account will not be charged transaction fees.

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Change (1/2)

- ❖ Choose one of the Portfolio corresponding with your risk appetite form 1st to 15th of each month.

Faculty Savings Trust Account / Member's Choice

Member's Choice

	Value Trend	Portfolio	Product Risk Appetite
<input type="radio"/>	▲	Aggressive Portfolio	Aggressive
<input checked="" type="radio"/>	▲	Lifecycle Portfolio 038-040	
<input type="radio"/>	▲	Conservative Portfolio	Conservative
<input type="radio"/>	▲	Stable Portfolio	Stable

Save Cancel

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Change (2/2)

- ❖ The website will show the message as you complete the Member's Choice.

私校儲金管理委員會
自主投資平台

Details

Account Logout

Faculty Savings Trust Account / Member's Choice

Back

Member's Choice

Display All Display

	Value Trend	Portfolio	Product Risk Appetite
<input type="radio"/>		<input type="radio"/> Aggressive Portfolio	Aggressive
<input type="radio"/>		<input type="checkbox"/> Conservative Portfolio	Conservative
<input checked="" type="radio"/>		<input type="checkbox"/> Stable Portfolio	Stable

Save Cancel

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Setting (1/3)

❖ You can set up your stop loss / stop profit point if necessary.

Faculty Savings Trust Account / Performance Management

Back

Description

Enabled

Display All

Display

Value Trend	Portfolio	Accumulated Amount	Accumulated Units	Net Asset Value	Market Value	Rate of Return	Stop Loss	Stop Profit	profit	Notice
	Aggressive Portfolio	0	0	0	0	0%	± 5	%	<input checked="" type="checkbox"/> Stop Loss	<input checked="" type="checkbox"/> Stop Profit
	Conservative Portfolio	760,759	75,696.113	10	799,290	4.58%	± 2	%	<input checked="" type="checkbox"/> Stop Loss	<input checked="" type="checkbox"/> Stop Profit

Save

Cancel

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Setting (2/3)

❖ By Email



The stop loss/ stop profit point has been triggered according to your previous set-up. Please check the details by logging in “Investment Adjustment” in our website from 1st to 15th of each month. Many thank!

Sincerely,

CTBC Bank

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Setting (3/3)

❖ By Pop-pop window

The stop loss/ stop profit point has been triggered according to your previous set-up. Please check the details by logging in “Investment Adjustment” in our website from 1st to 15th of each month.

Confirm

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Transform (1/4)

- ❖ You can redeem your stock units then invest another portfolio corresponding with your risk appetite form 1st to 15th of each month.

1. The blank will be locked if your risk appetite is lower than the portfolio.
2. Lifecycle Fund will be allowed to insert the “Redemption percentage” and Member’s Choice Portfolio will be allowed to insert the “Redemption Units”.

Value Trend	Portfolio	Accumulated Units	Redemption Units	Redemption percentage	Switch to Product Code	Net Asset Value *	Amount NT *
	Lifecycle Portfolio 036-040	1,049,229	Units Units Units	% % %	Conservative Portfolio (Conservative) Stable Portfolio (Stable) Aggressive Portfolio (Aggressive)	10.11	
	Conservative Portfolio	101,588,656	Units Units Units	% % %	Lifecycle Portfolio 036-040 Stable Portfolio (Stable) Aggressive Portfolio (Aggressive)	10	
	Stable Portfolio	186.25	Units Units Units	% % %	Lifecycle Portfolio 036-040 Conservative Portfolio (Conservative) Aggressive Portfolio (Aggressive)	10.1	

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Transform (2/4)

Condition 1. Transaction Failed

You have applied for "Investment Adjustment" over 2 times and will be charged transaction fee but the redemption amounts are insufficient for the transaction fee.

Transaction failed. You have applied for "Investment Adjustment" over [6] times including this time and will be charged NT\$[200] as transaction fee because everyone only has two times for free per year. But we will not accept your application because the redemption amounts are insufficient for the transaction fee.

Confirm

Condition 2. Check Again

You have applied for "Investment Adjustment" over 2 times and will be charged transaction fee but the redemption amounts will be zero after deducted the transaction fee.

You have applied for "Investment Adjustment" over [8] times including this time and will be charged NT\$[200] as transaction fee because everyone only has two times for free per year. Your new investment amount will be zero after deducting the transaction fee. Please confirm that you would like to make adjustment or not?

Confirm Cancel

Condition 3. Transaction Successful

You have applied for "Investment Adjustment" lower than 2 times or over 2 times but the redemption amounts are sufficient for the transaction fee.

Remind ×

Dears,
You have applied for "Investment Adjustment" over [8] times including this time and will be charged NT\$[200] as transaction fee because everyone only has two times for free per year. Would you like to continue processing this transaction?

Confirm Cancel

Transform (3/4)

- ❖ CTBC Bank will redeem the units on 17th of each month (for public holiday will be delayed to immediately business day).

The screenshot shows the 'Faculty Savings Trust Account' interface. A 'Remind' dialog box is open, displaying the following text: '2015/10/13 Please delete your application before 12:00 PM on the 15th of each month if you would like to cancel your "investment adjustment". Are you sure to execute the "investment adjustment"?' The dialog has 'Confirm' and 'Cancel' buttons. Below the dialog, the 'Investment Adjustment' section is visible, showing a table with columns: Value Trend, Portfolio, Stocks, Redemption Units, Switch to Product Code, Net Asset Value, and Amount NT. The table contains two rows: 'Conservative Portfolio' with a value of 75,470.119 and 'Stable Portfolio' with a value of 9.9393. The 'Amount NT' column has a value of 200. There are 'Save' and 'Cancel' buttons at the bottom left of the table. An 'Important note' is located at the bottom of the page, stating: 'Jordan NT amount transferred only to recently, reference to the net calculation and Net reference combination of actual amount transferred out will be in a month on the 17th of the investment subject.'

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Trade date is YYYYMMDD and redemption date is YYYYMMDD. Please delete your transaction before 24:00 on trade date if you would like to cancel your application.

Transform (4/4)

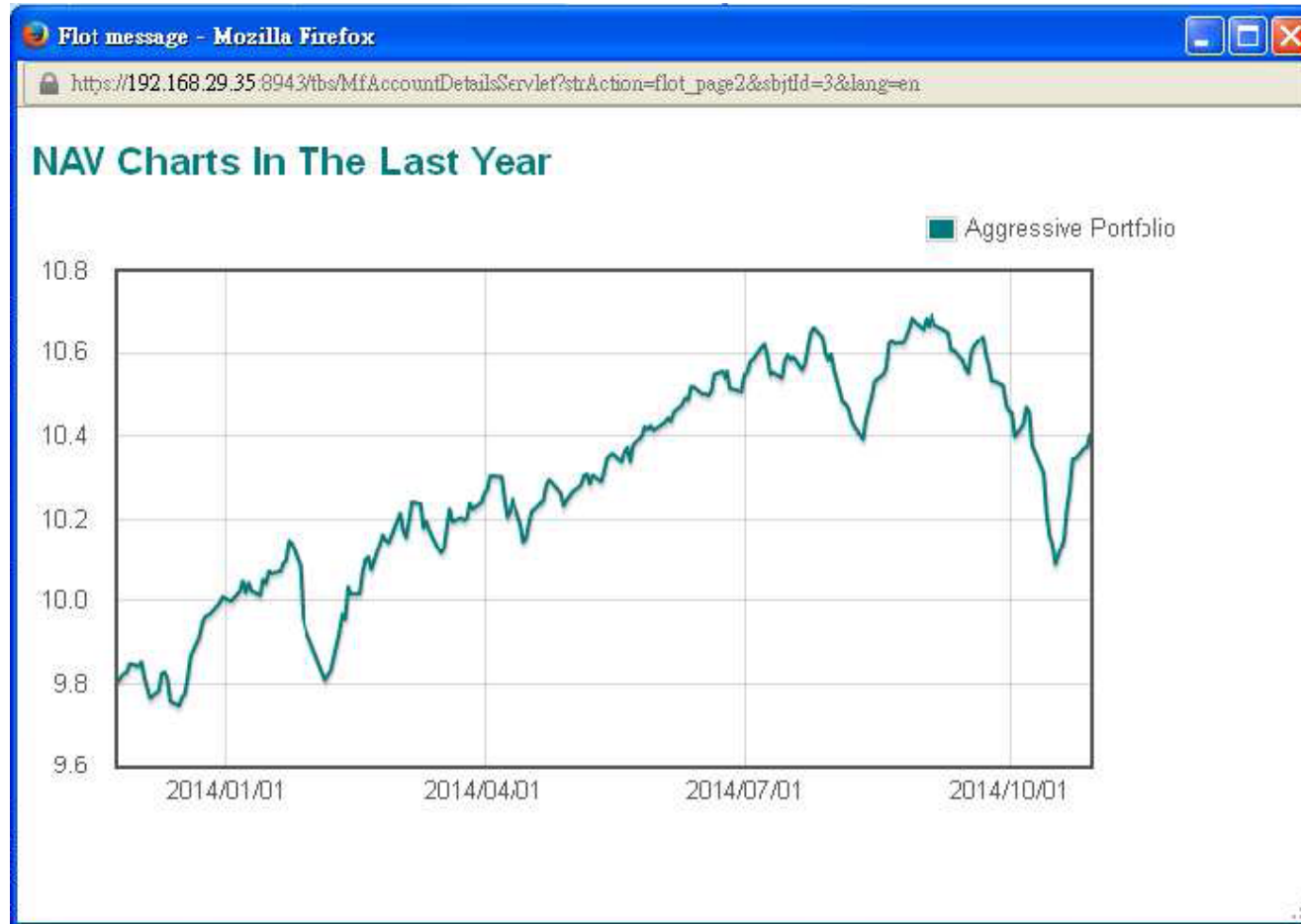
- ❖ You can delete your transaction before 24:00 before 15th of each month by entering “Transaction Overview”.

The screenshot displays the 'Faculty Savings Trust Account' interface. At the top, there is a navigation bar with the logo of the Private School Pension Management Committee and the text '自主投資平台'. A search bar contains the word 'Details'. On the right, there are links for 'Account' and 'Logout'. A central white warning box with a close button (X) contains the text: 'Please delete your application by "transaction overview" before 12:00 on the 15th of each month if you would like to cancel your "investment adjustment"'. Below the warning, the page title is 'Faculty Savings Trust Account' with a 'Back' button. The main content area is titled 'Investment Adjustment' and includes a 'Display All' button and a 'Display' dropdown menu. A table with the following columns is visible: 'Value Trend', 'Portfolio', 'Stocks', 'Redemption Units', 'Switch to Product Code', 'Net Asset Value', and 'Amount NT'. The table shows a 'Conservative Portfolio' with a stock value of 75,470,113 and a net asset value of 9.9999. There are two 'Units' input fields under the 'Redemption Units' column. At the bottom of the table area, there are 'Save' and 'Cancel' buttons. Below the table, there is an 'Important note' section with the text: 'Jordan NT amount transferred only to recently, reference to the net calculation and. Net: reference combination of actual amount transferred out will be in a month on the 17th of the investment subject.'

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

NAV

❖ You can inquiry the NAV any time within the last year



Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Portfolio Description



Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only.

Step 4. Others

Inquiries/Current NAV(1/3)

❖ You can inquiry the NAV within last year

Inquiries / Current NAV




Account Summary

Faculty Savings Trust: Account

Inquiry

Current NAV

Display All | Display ▾

Date of NAV	Portfolio	Current NAV	Daily NAV Variation	Rate of Variation	NAV of the Last Month
2015-09-01	 Conservative Portfolio	9.9999	0.559	5.593	Inquiry
2015-08-31	 Stable Portfolio	11.7682	0.042	0.356	Inquiry
2015-08-31	 Aggressive Portfolio	11.1912	0.079	0.708	Inquiry

View 1 ~ 3, Total 3

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only.

Inquiries/Current NAV(2/3)

❖ NAV Charts within last year



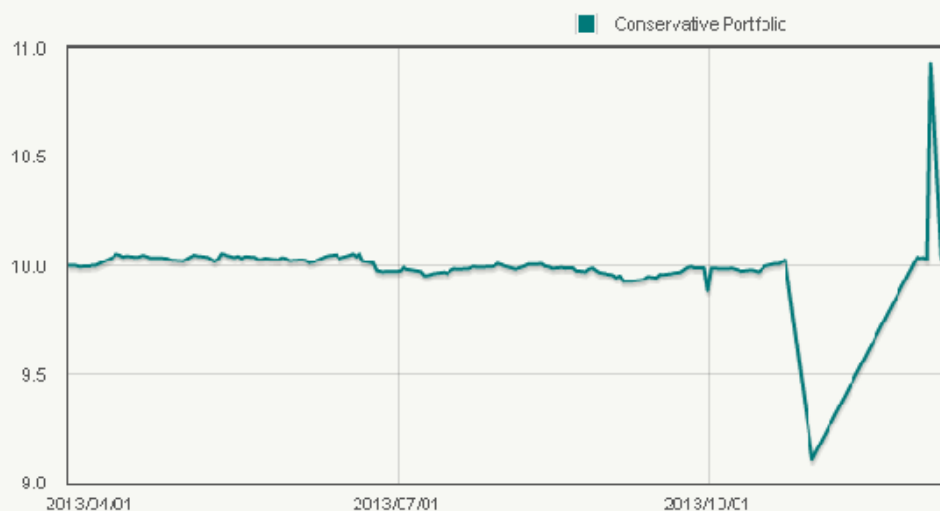
[Details](#) [Inquiries](#) [Questions](#) [Download](#) [Preference](#) [Questionnaire](#)

[Account](#) [Logout](#)

[Inquiries](#) / [Current NAV](#) / [NAV of the Last Month](#)

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NAV Charts In The Last Year



Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Inquiries/Current NAV(3/3)

❖ NAV Details within last month

Date time 2015-10-13 17:37:30

Monthly NAV

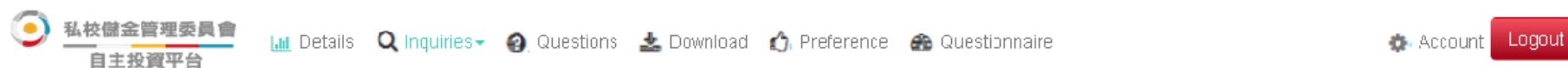
Display All Display ▾

Date	NAV	Date	NAV	Date	NAV
2015-03-01	9.9999	2015-08-31	10.5592	2015-08-23	10.5423
2015-03-27	10.4744	2015-08-26	10.5055	2015-08-25	10.5155
2015-03-24	10.6237	2015-08-21	10.6464	2015-08-20	10.6297
2015-03-19	10.6517	2015-08-18	10.6539	2015-08-17	10.6403
2015-03-14	10.5939	2015-08-13	10.5815	2015-08-12	10.6355

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Inquiries/Transaction Overview (1/2)

❖ You can delete your application of “Investment Adjustment” before 24:00 on 15th of each month if necessary.



Inquiries / Transaction Overview

Account Type: Faculty Savings Trust Account Transaction Type: All Transaction Status: All

Inquiry Time: 3 Month 6 Month 1 Year Period

Data time 2015-10-13 17:33:46

Transaction Overview

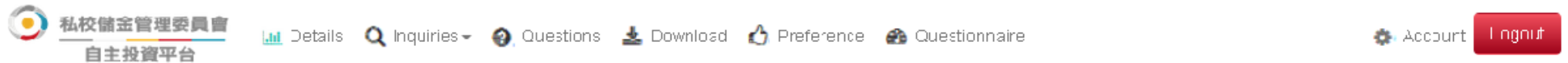
Display All Display

Delete	No.	Instruction	Classification	Status	Result	Redemption Portfolio	Redemption Unit	Investment Portfolio	Authorization
	1	2015-10-13 17:36:00	Member's Choice	Transaction Completion	Stable	Stable Portfolio			2015-10-13 17:36:00
	2	2015-10-13 17:35:39	Performance Management	Transaction Completion					2015-10-13 17:35:39
<input type="checkbox"/>	3	2015-10-13 17:35:07	Investment Adjustment	Operation Processing		Conservative Portfolio	10	Stable Portfolio	2015-10-13 17:35:07
<input type="checkbox"/>	4	2015-10-13 17:35:07	Investment Adjustment	Operation Processing		Conservative Portfolio	10	Aggressive Portfolio	2015-10-13 17:35:07
	5	2015-10-12 15:39:31	Member's Choice	Transaction Completion	Aggressive	Aggressive Portfolio			2015-10-12 15:39:31

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Inquiries/Transaction Overview (2/2)

- ❖ You can inquiry the transactions by the “Transaction Type”, “Transaction Status” or “Period”.



Inquiries / Transaction Overview

Account Type: Faculty Savings Trust Account
Transaction Type: All
Transaction Status: All
Inquiry Time: 3 Month | 6 Month | 1 Year | Period
2015-10-13 -- 2015-10-13
Inquiry The period must be within a year

Important Reminder

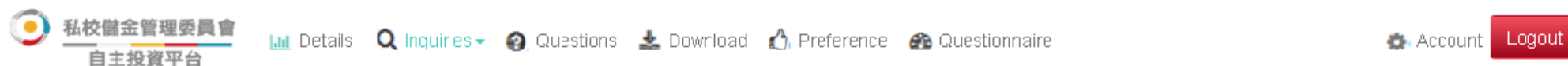
The accumulated amounts and accumulated units shown on this web page are for reference only. The amounts you can withdraw will be in accordance with the bookkeeping records of DTBC Bank based on the contract of 'Retirement, Compensation, Resignation and Severance Fund Management Committee for Teachers and Staff of Private School Consortium Corporations of the Republic of China'.

⚠️The value date of investment and redemption is 17th of each month(for public holiday, will be delayed to the immediately working day)

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Inquiries/Archive Records (1/2)

❖ You can inquire the archive records during the managed centrally by the pension fund committee .



Inquiries / Archive Records

Data Period From 2010/01/01 to 2013/03/18

Archive Records

Display All Display ▾

Account Name	Product Name	Accumulated Amounts	Accumulated Units	Net Asset Value	Market Value (E=BxCxD)	Profits and losses (F=E-A)	Rate of Return (G=F/A)	Investment Details
FACULTIES BENEFIT AND SAVING TRUST ACCOUNT	SCHOOL'S CONTR BUTION	133,873	13,500.088	9.992TWD	134,895	1,022	0	Inquiry
FACULTIES BENEFIT AND SAVING TRUST ACCOUNT	TRIC AUTHORITY'S CONTRIBUTION	124,328	12,538.671	9.992TWD	125,288	860	0	Inquiry
FACULTIES BENEFIT AND SAVING TRUST ACCOUNT	FACULTY'S CONTR BUTION	133,024	13,416.696	9.992TWD	134,062	1,038	0	Inquiry
FACULTIES BENEFIT AND SAVING TRUST ACCOUNT	結算分配	8,511	869.314	9.992TWD	8,686	175	2	Inquiry

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Inquiries/Archive Records (2/2)

❖ You can inquire the trading details from 2012/01/10 to 2013/03/08.

Inquiries / Archive Records / Investment Details

[Back](#)

Taiwan Time: 2015-10-13 17:42:17

Faculty Savings Trust Account

Display All Display

Trade Date	Classification	Contribution Amounts	Investment Amounts	Redemption Amounts	Payment Amounts	Market Value	Per Unit Exchange Rate	Units	Fees
2013-03-19	REDEEMING	133,873	0	134,900	134,900	9.992 TWD	1	13,500.068	0
2013-02-06	INVESTMENT	3,843	3,843	0	0	9.989 TWD	1	384.719	0
2013-01-04	INVESTMENT	4,291	4,291	0	0	9.986 TWD	1	429.723	0
2012-12-04	INVESTMENT	3,731	3,731	0	0	9.997 TWD	1	373.305	0
2012-11-12	INVESTMENT	3,731	3,731	0	0	9.867 TWD	1	378.133	0
2012-10-03	INVESTMENT	3,731	3,731	0	0	9.963 TWD	1	374.497	0
2012-09-05	INVESTMENT	3,731	3,731	0	0	10.011 TWD	1	372.683	0

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Questions

❖ We will contact with you according your message as soon as possible.



[Details](#) [Inquiries](#) [Questions](#) [Download](#) [Preference](#) [Questionnaire](#)

[Account](#) [Logout](#)

Questions

CTBC Bank Private School Faculty Service Line:(02)2558-0128
Business Hours are Monday - Friday (except for weekends and holidays).
Please contact us from 9:30 a.m. to 5:30 p.m. weekdays.
Please leave any messages and preferred contacts at the above voice mail box.
We will contact you at our business hours.
Thank.

Name	<input type="text" value="測試雁樓夾"/>
School	<input type="text" value="TRUST"/>
Phone Number	<input type="text"/>
Email	<input type="text"/>
Question Type	<input type="text" value="E-banking Operation Questions"/>
Contents	<ul style="list-style-type: none">E-banking Operation QuestionsAccounting QuestionsPension SchemeInvestment Consultant

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Download

❖ You can download the operating manual, Portfolio Description and Monthly Report if necessary.

The screenshot shows the top navigation bar of the website. On the left, there is a logo for the Private School Education Management Committee (私校儲金管理委員會) and the text '自主投資平台'. The navigation menu includes links for 'Details', 'Inquiries', 'Questions', 'Download', 'Preference', and 'Questionnaire'. On the right, there is an 'Account' link and a 'Logout' button. Below the navigation bar, there is a list of menu items: 'Instructions', 'Portfolio Description', and 'Monthly Report'. The 'Monthly Report' item is highlighted with a red dashed box. Below the menu items, there is a list of portfolio and statement options:

- T-Conservative Portfolio
- T-Stable Portfolio
- T-Aggressive Portfolio
- Conservative Portfolio Statement
- Conservative Portfolio Statement
- Stable Portfolio Statement
- Stable Portfolio Statement
- Aggressive Portfolio Statement
- Aggressive Portfolio Statement
- Additional Contribution -Conservative Portfolio Statement

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Preference

❖ CTBC Bank will announce exclusive preference for private school's faculties

私校儲金管理委員會
自主投資平台

Details Inquiries Questions Download Preference Questionnaire Account Logout

Preference

寒假旅遊優惠專案

雄獅旅遊

說明文字說明文字說明文字說明文字說明文字
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瞭解更多

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Questionnaire (1/2)

❖ Please complete the risk tolerance questionnaire before processing your member's choice for the first time.

The screenshot shows the 'Risk Tolerance Questionnaire' page. At the top, there is a navigation bar with the logo of the Private School Consortium Management Committee and the text '自主投資平台'. The navigation menu includes 'Details', 'Inquiries', 'Questions', 'Download', 'Preference', and 'Questionnaire'. There are also 'Account' and 'Logout' buttons. The main content area is titled 'Risk Tolerance Questionnaire' and contains a message: 'Dears, Please complete the risk tolerance questionnaire, and then you can invest all of your pension in the portfolio corresponding with your risk appetite. Meanwhile, you can click the button of "Questions" to contact with the financial advisor if you don't know how to fill out the form.' To the right of this message, a box displays 'Risk Appetite is Aggressive' and 'Date of last update is: 2017-08-08'. Below the message is a progress bar with three steps: 'Step 1 Acknowledgement', 'Step 2', and 'Step 3'. The 'Step 1 Acknowledgement' section contains a paragraph of text: 'I hereby confirm and agree that CTBC Bank and the Investment Consultant, in accordance with the contents of the Agreement signed with "Retirement, Compensation, Resignation and Severance Fund Management Committee for Teachers and Staff of Private School Consortium Corporations of the Republic of China", has the right to collect, process, use and/or internationally transmit my personal information and, in the event that the information I have provided to CTBC Bank includes the personal information of a third party other than myself. I have the right to make inquiry or request for a review of, to make duplicates of, to request of supplement or correction of, to discontinue the collection, processing or use of, or to delete my personal information, but it is possible according to the laws or due to risk management factor.' Below this text are two radio buttons labeled 'Yes' and 'No'.

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Questionnaire (2/2)

❖ You can revise your risk questionnaire anytime form 1st to 15th of each month if necessary.

私校儲金管理委員會
自主投資平台

Details Inquiries Questions Download Preference Questionnaire Account Logout

Step 3 Important Reminder

Step 1 Step 2 Step 3

Risk Appetite is
Aggressive

Date of last update is
2017-08-08

Important Reminder

1. I agree and authorize CTBC Bank could invest my monthly contribution and/or all my pension fund into the portfolio in connection with my risk tolerance if the risk appetite of the portfolio I would like to invest is higher than mine.
2. Your application will be processed and executed in the same month if you complete this application form on the website during 1st-15th of this month.
3. Kindly remind you to set up the portfolio you would like to invest in every month after finishing the risk tolerance questionnaire then you just complete the member's choice process.

Risk Appetite	Description
Conservative	You cannot take any risk at all and are suitable to invest in the conservative portfolio to secure your principal.
Stable	You can take few risks to gain stable earnings.
Aggressive	You can take higher risks to aggressively pursue profits.

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

Step 5. Account

Account

❖ You can change User ID and Password online.

Account

Change User ID

Change Password

Change User ID

Old User ID

Change User ID

Confirm New User ID

Submit

Clear

The user id of rules that (the length of the input box 12)

help:

1. User's ID should consist of 6-12 digits of number or letter.
2. New user's ID should not be identical to old user's ID.

Note: The production webpage by logging in the exclusive website shall be deemed and the above is for your reference only .

**Please contact with the client service center of
CTBC Bank as below if you have any questions regarding
the e-banking operation or accounting**

+886-2-2558-0128

**Note : CTBC bank keeps the right of revising related documents
and web pages of member's choice platform.**

