The Rich Life
User Guide

PC Securities Financial Group
寶鉅證券金融集團

Content

1. About Us

"The Rich Life" APP is a mobile application developed by PCSFG which provides a one-stop cross-border financial management services, covering hot topics, financial insights, chatroom and account management in one go.

Our latest technology and friendly user interface provide users highly secure and convenient financial management experience. "The Rich Life" APP is also a social media platform where users can discuss and share different hot topics with affluent people globally. With its integrated communication function, it allows users to interact with each other's anytime and anywhere. It is definitely one of your must have APP for wealth management purpose!
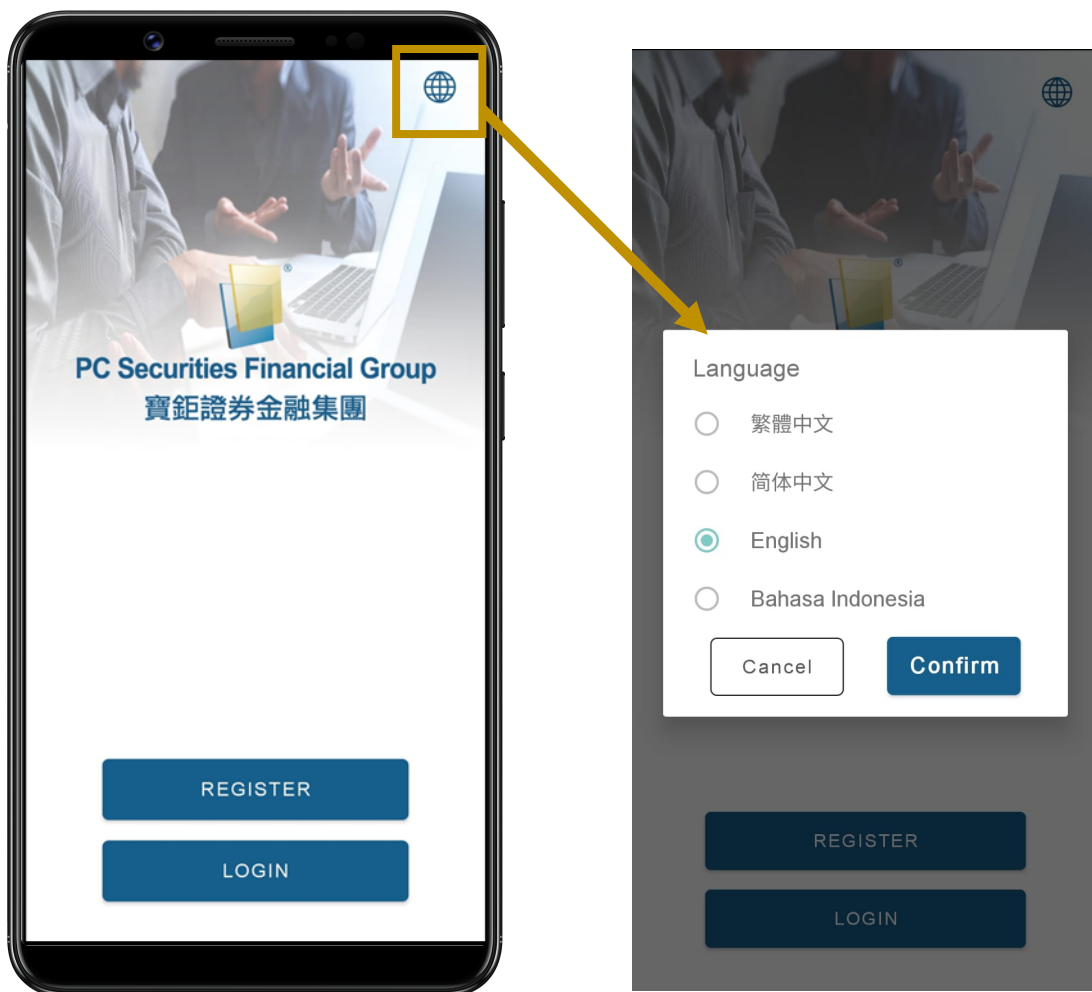
2. Language Settings

Upon opening the "The Rich Life" APP for the first time, users can tap on ⊞ to select their preferred language they wish to display.

If the user would like to change the system language, please modify it in "Profile"> "Setting"> "Language".

3. Register/Login

## 3.1 New User Registration

If you are first time to access "The Rich Life" APP, please click "Register" to create an account.

(A)   Click "Register" after launching "The Rich Life" APP
(B)   Input email address and mobile number, click "Next"
Note: If you have previously registered the "The Rich Life" APP, the email address cannot be the same as the previous registered account, same phone number can be used for registering a new account.
(C)   A One-time Password (OTP) will be sent to your registered email and mobile number. Input the given password and then click "Next".
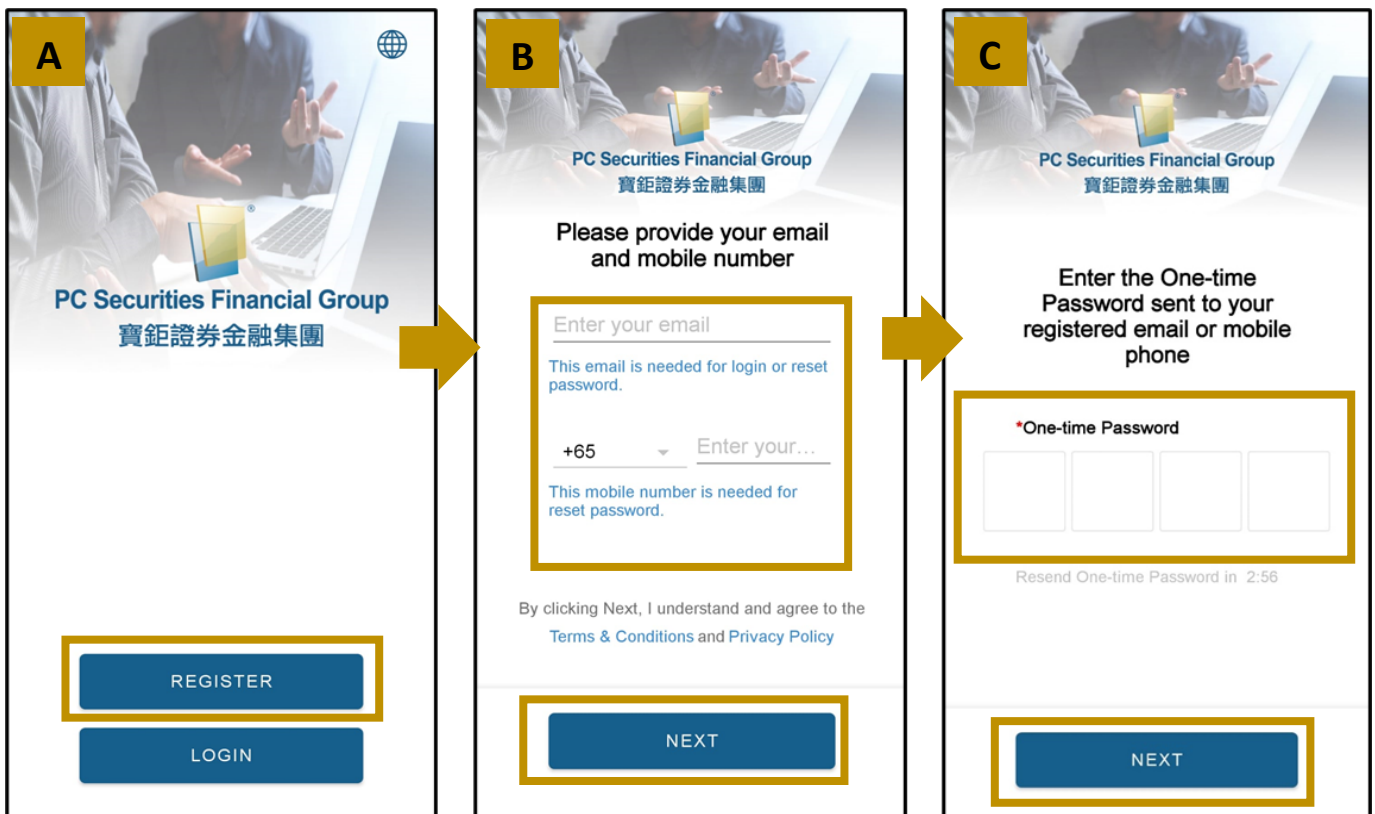
3.2 Password Setting

Under "Set your own password", new users can set a new set of passwords, and use it whenever logging into the APP.

(D)   To set a password, the following three conditions is required:
    -At least 8 characters
    -At least one English alphabet
    -At least one number
    When the password conditions are met, the font will change from gray to blue. The user will need to confirm the password by re-entering the same set of passwords at the blank "Confirm Password", and then click "Next".

(E)   Fill in your personal information including: First name, Last name, Nickname and Date of Birth. Click "Next" to start using the APP.

Note：

Fields marked with an asterisk (*) are Mandatory fields.
System will default your First name as your Nickname if no new entry found in the "Nickname" field. You may then change your nickname under "Profile" > click "Next".

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3.3 Existing Customer Login

(A) When existing PCSFG customer download the "The Rich Life" APP, please press "Login".

(B) Enter the email address and password of previous old PCSFG APP, then click "Login".

Note: The "The Rich Life" App do not allow the same account to log in at the same time through different mobile phones;
After successfully log in, the previously logged-in account will be automatically logged out.

(C) A One-time Password (OTP) will be sent to your registered email and mobile number. Input the given password and then click "Next".


Enter the email address and password of previous old PCSFG APP, then click "Login".
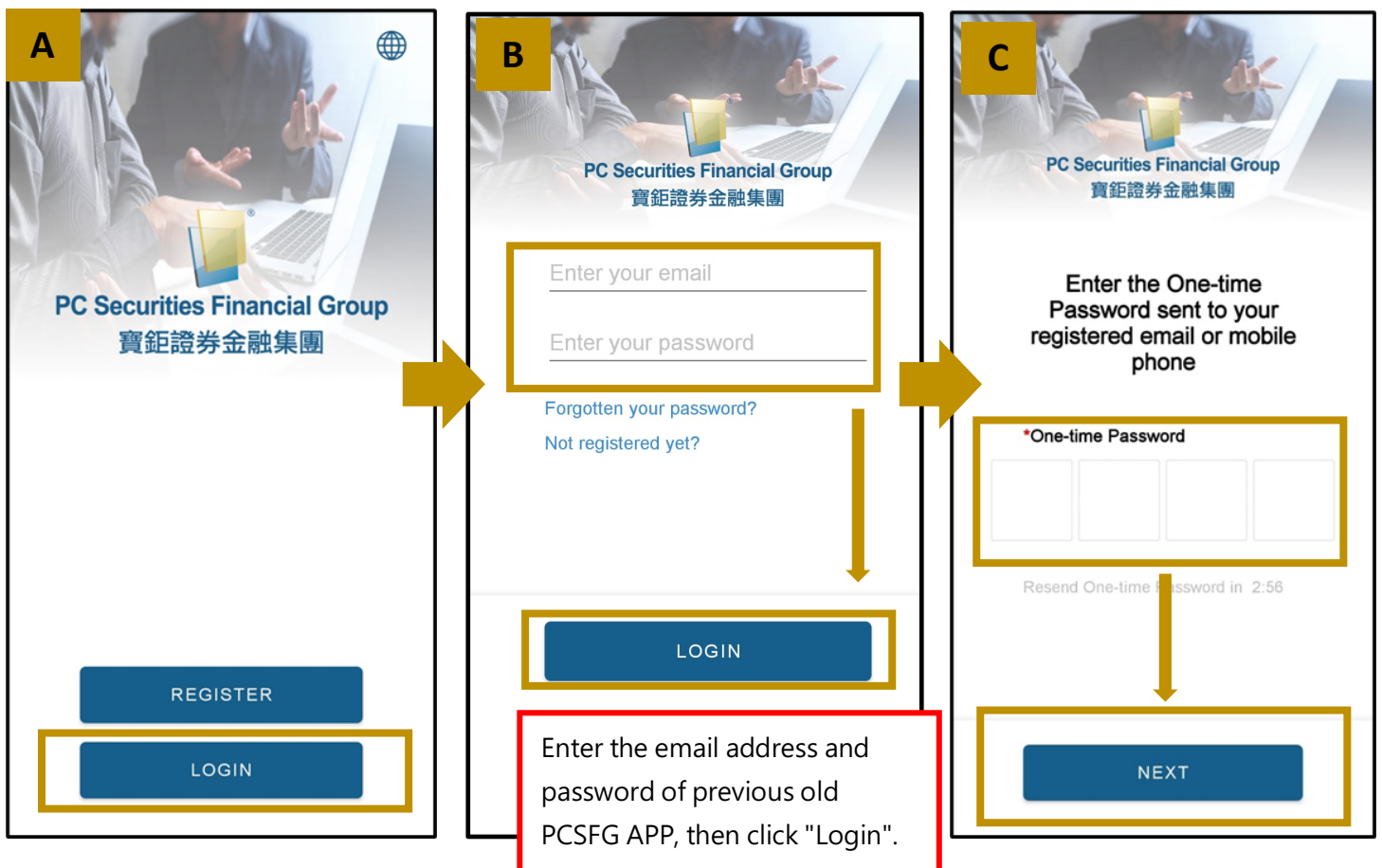
3.4 Forget Password

D)　If you have forgotten your password, you may click "Forgotten your password" to reset your password.

(E)　Enter your previous login email address and password, click "Next".

(F)　A One-time Password (OTP) will be sent to your registered email and mobile number. Input the given password and then click "Next"

(G)　To set a new password, the following three conditions is required:

-At least 8 characters

-At least one English alphabet

-At least one number

When the password conditions are met, the font will change from gray to blue. The user will need to confirm the password by re-entering the same set of passwords at the blank "Re-enter new password", and then click "Reset password" to start using the app.
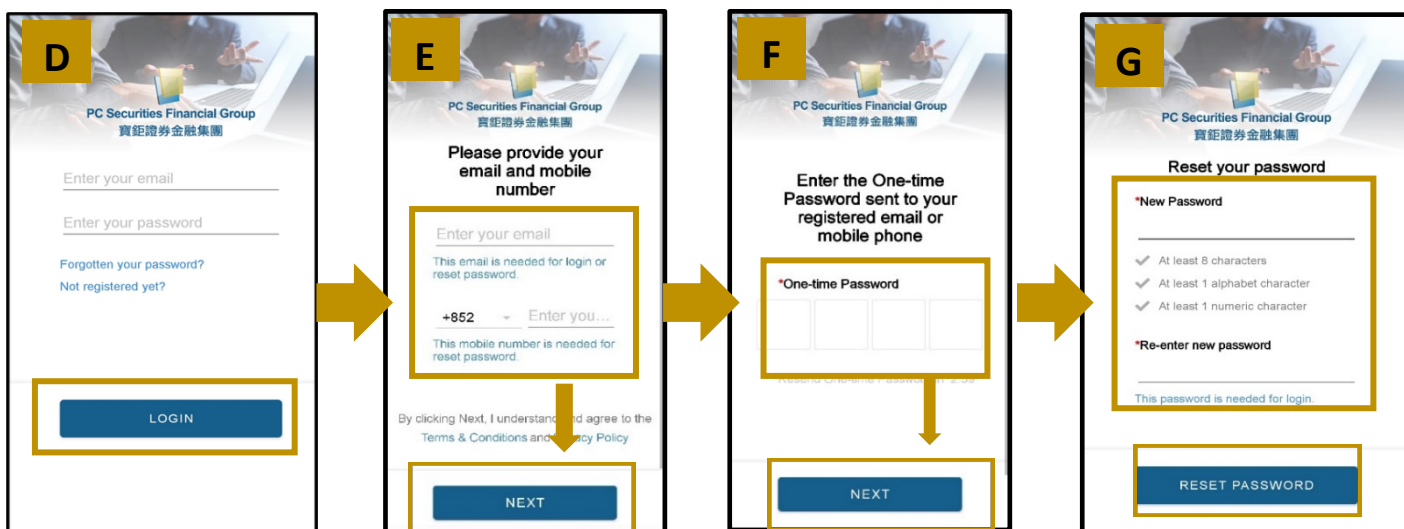
4. Homepage

The homepage shows the five key functions of "The Rich Life" APP: Explore, Profile, Trade, Account and Chat.
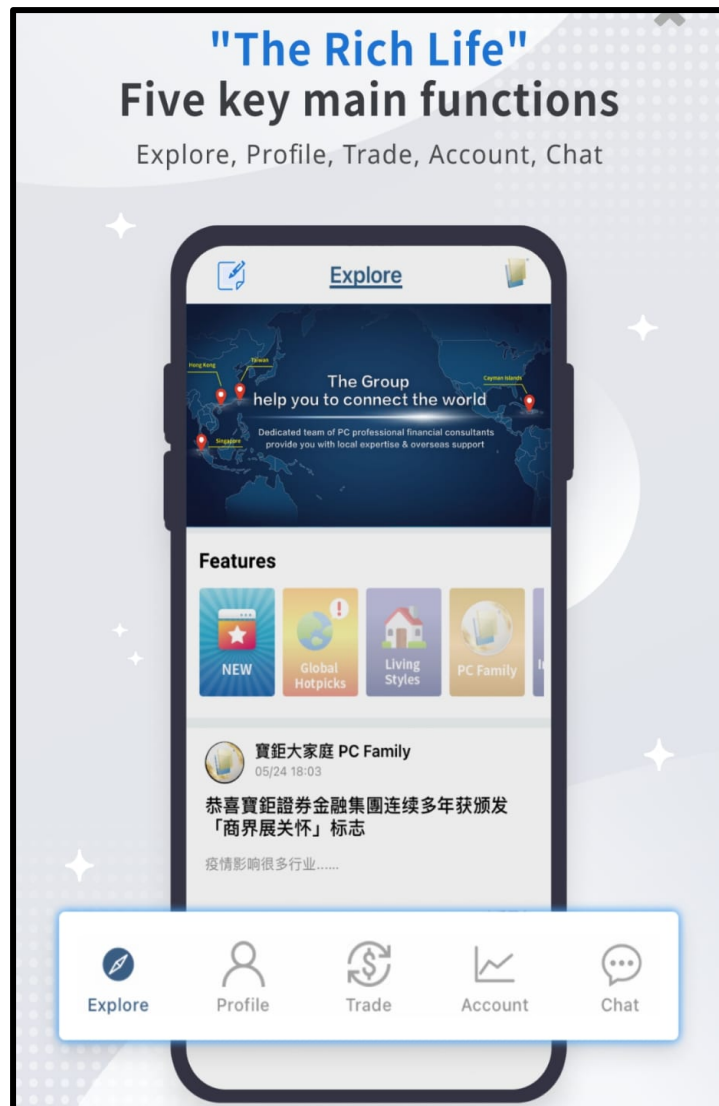
5. Explore

The main functions of the "Explore" page includes create new post, filtering by category, advertising banner, user postings, etc.

(A) Create New Post
Create online post on latest and hottest market topics

(B) Direct link to PC Securities Financial Group Website
Direct link to PC Securities Financial Group official website upon clicking on the bottom

(C) Advertising Banner
View advertisement on product and new promotion etc.

(D) Filtering by Category
Explore content based on user interests by filtering content category

(E) User Postings
View users' new posts and articles

5.1 Create New Post

(A) To create a new post, tap on [icon] at the upper left corner

(B) Fill in title and content（Include URL link if any）
Note: Insert of title and content is mandatory

(C) Tap on "Photo" to upload photos from photo gallery, maximum capped at 9 photos

(D) Upload only 1 video from device gallery or camera, video length is maximum capped at 2 mins

(E) To confirm posting, Click "Post" to complete post

(A) Click to post

(E)＂Post＂to complete

(B) Insert Title and Content

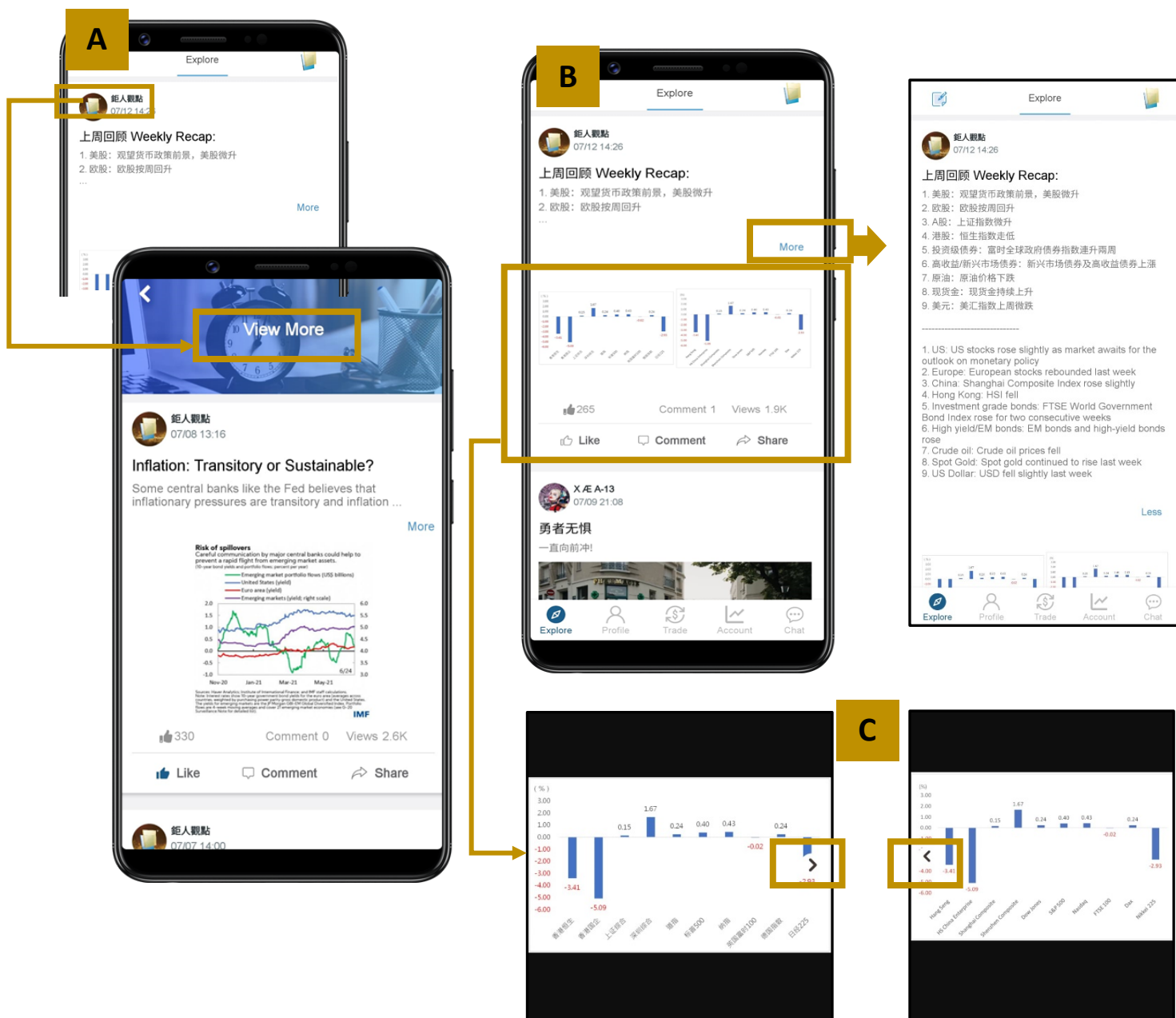**(C) Upload Photo**

(D) Upload Video

5.2 View User Content

Users may tap on the name of others users to view all of his/her posts in the past.

Check out other user's posts by tapping on the name:
(A) To view full content, tap on "More" to expand content.
(B) Tap on photo to view all photos. Slide to the left or right to view photos.

5.3 Like, Comment and Share

Users able to "Like" and "Comment" on the posts they like, and even share the posts with friends and family.
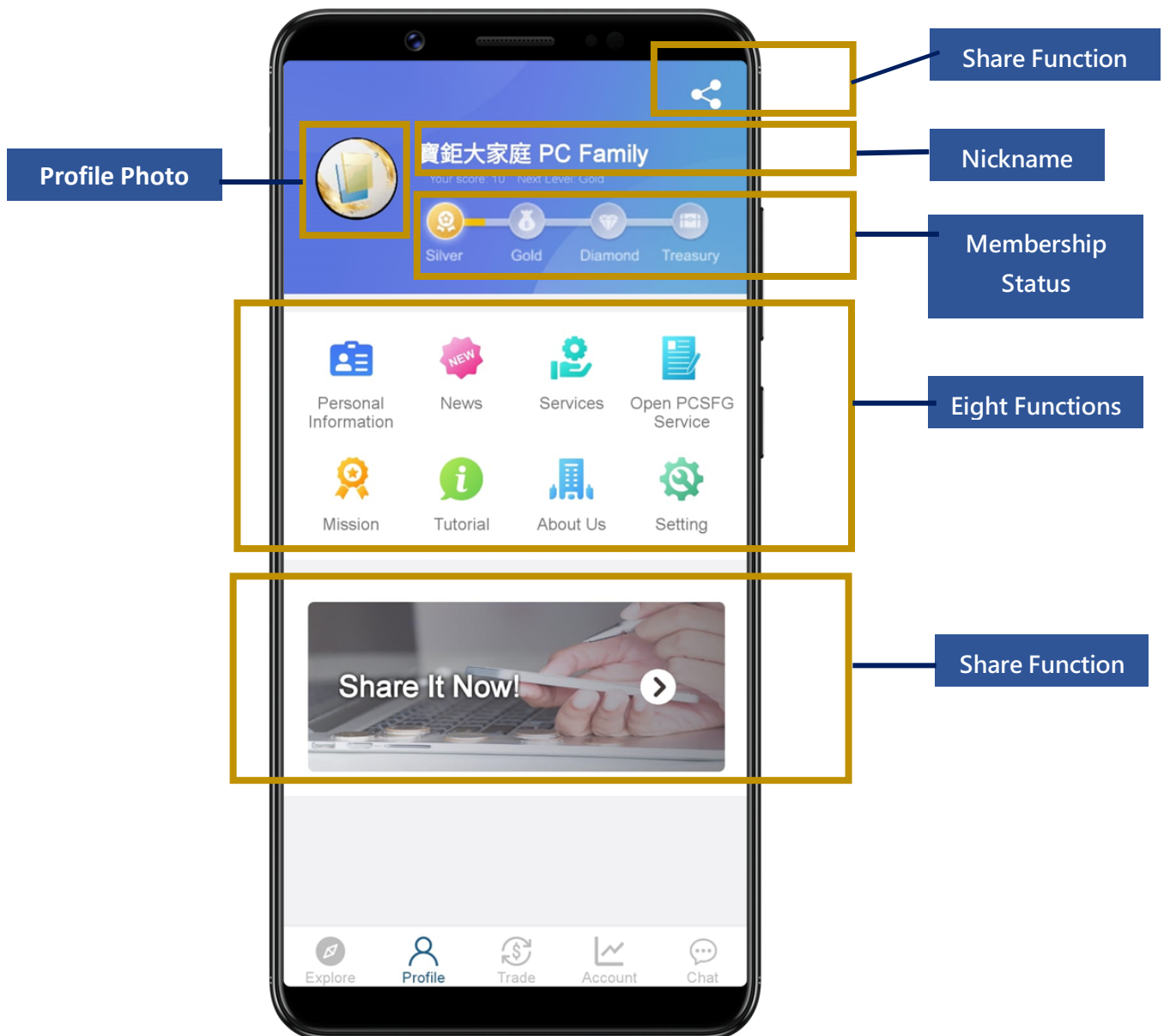
(A) If you see post that interests you, you can like, once like, it cannot be undone
(B) Tap on "Comment" to view comments or add a new comment, click [➤] to post comment.
(C) You may tap on user name to reply to a comment to create a conversation.
(D) User is unable to edit the comment once it is posted, but is able to delete the comment.
(E) User may tap on "Share" to share the APP to your friends and relatives through preferred sharing platform.
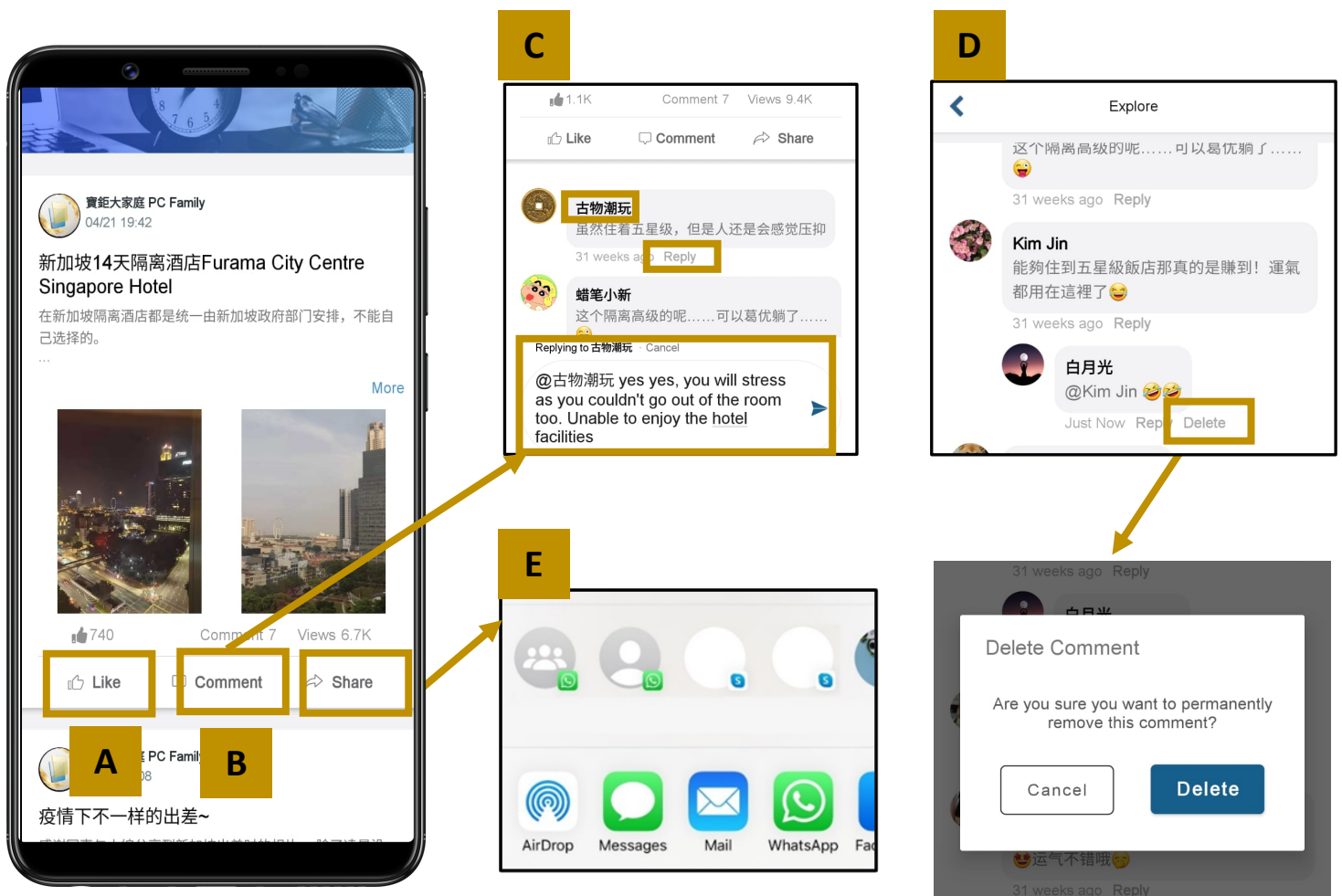
6. Profile

The "Profile" page mainly displays app user information, comprising of Profile Photo, Nickname, Membership Status, Eight Functions, and sharing Function.

Share Function

Nickname

Membership Status

Eight Functions

Share Function

Profile Photo

寶鉅大家庭 PC Family
Your score: 10   Next Level: Gold

Silver   Gold   Diamond   Treasury

Personal Information   News   Services   Open PCSFG Service

Mission   Tutorial   About Us   Setting

Share It Now!

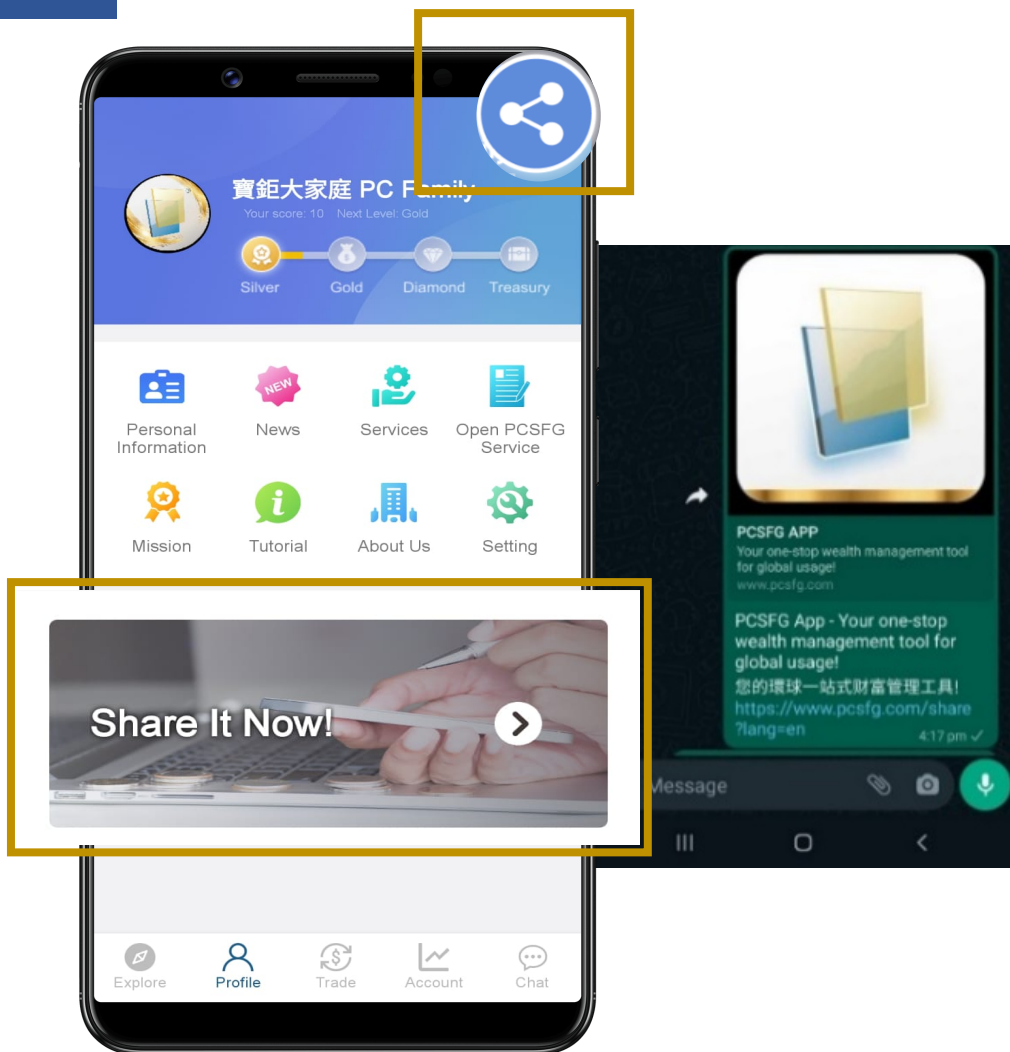Explore   Profile   Trade   Account   Chat

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6.1 Share Function

Click the "Share" icon on the upper right corner or click the "Share It Now" banner to share the "The Rich Life" APP to your friends and relatives, and enjoy the fun of using "The Rich Life" APP together!
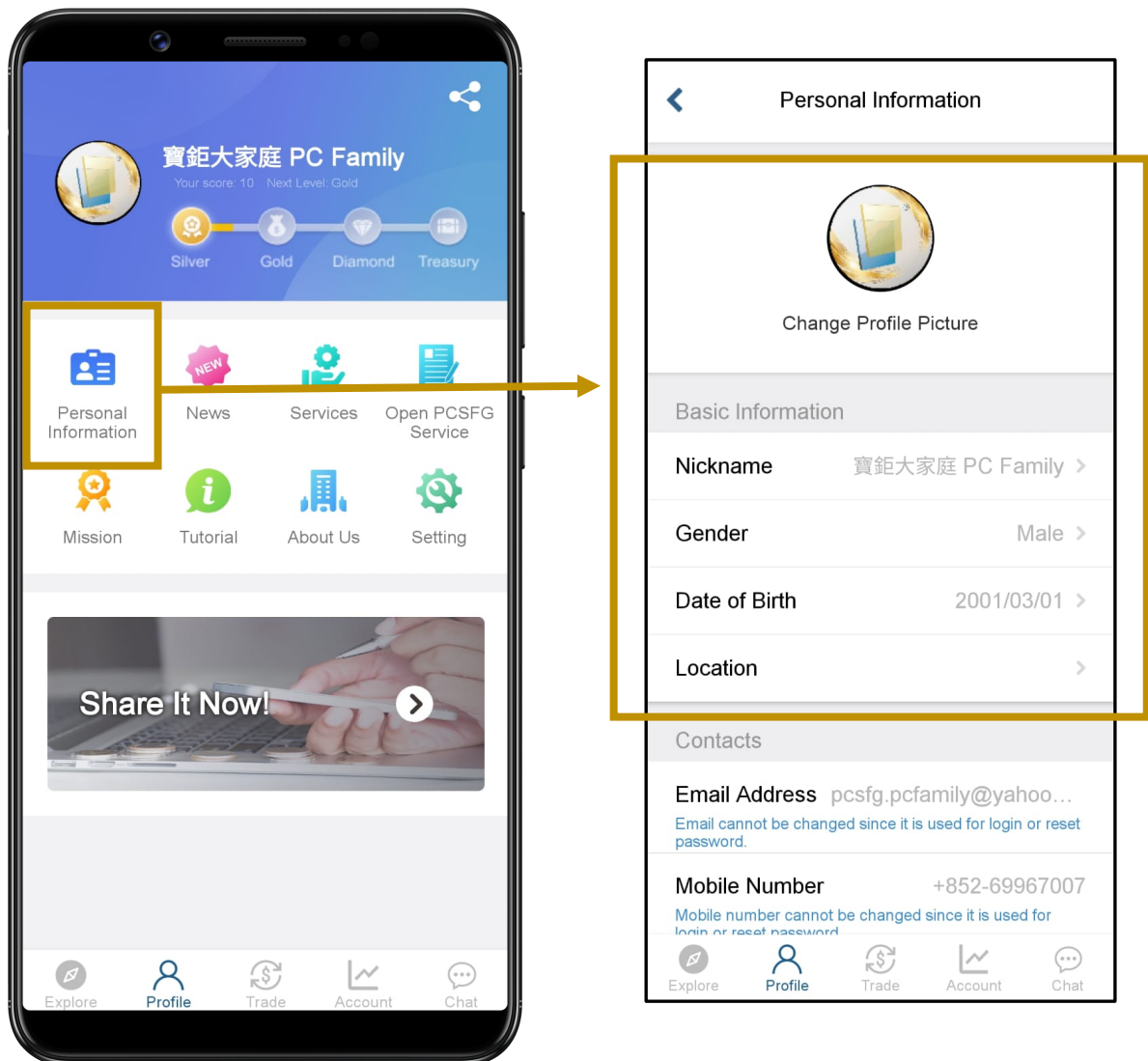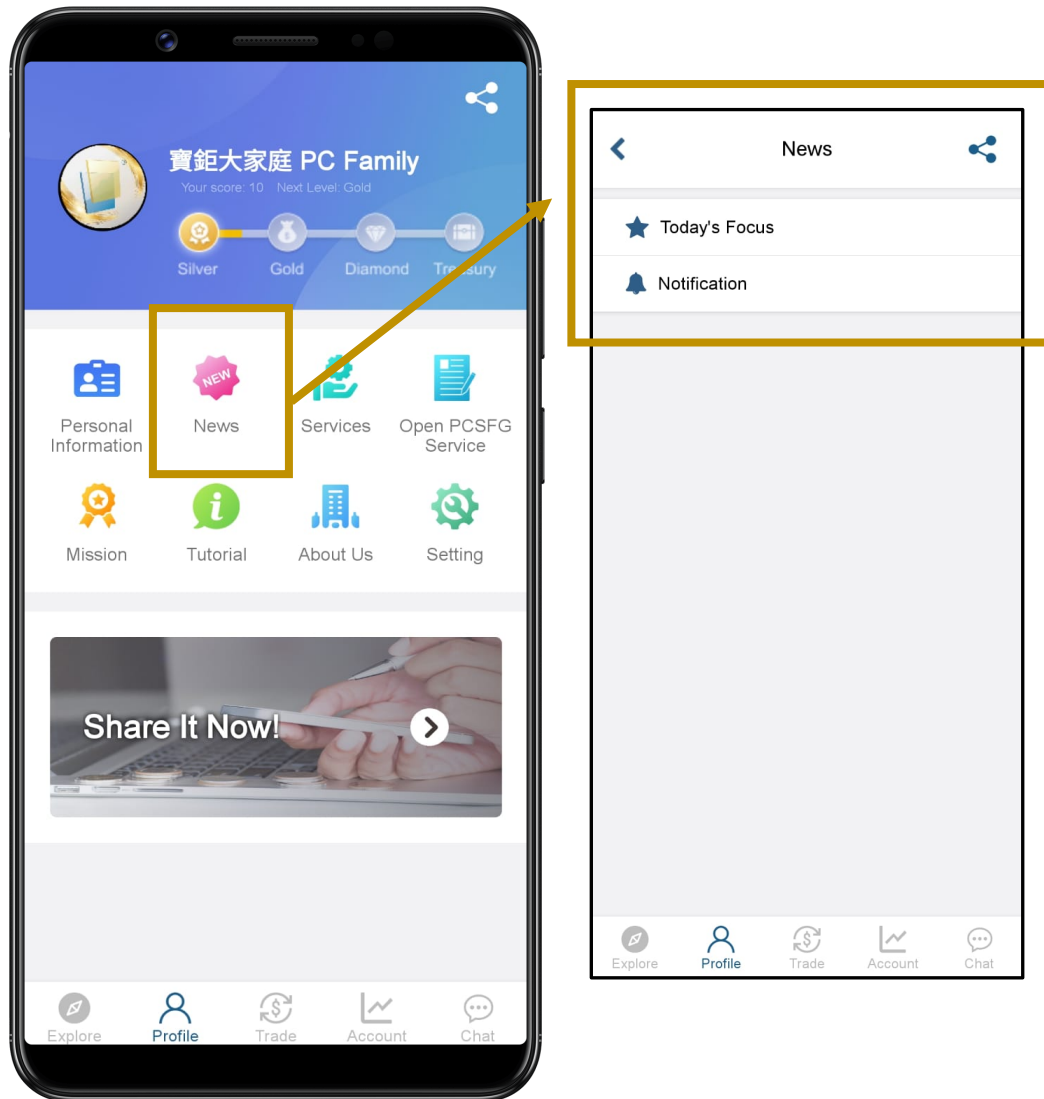
Share Function

6.2 Personal Information

Simply click on "Personal Information" to add or modify personal information, including profile photo, nickname, date of birth, location, etc
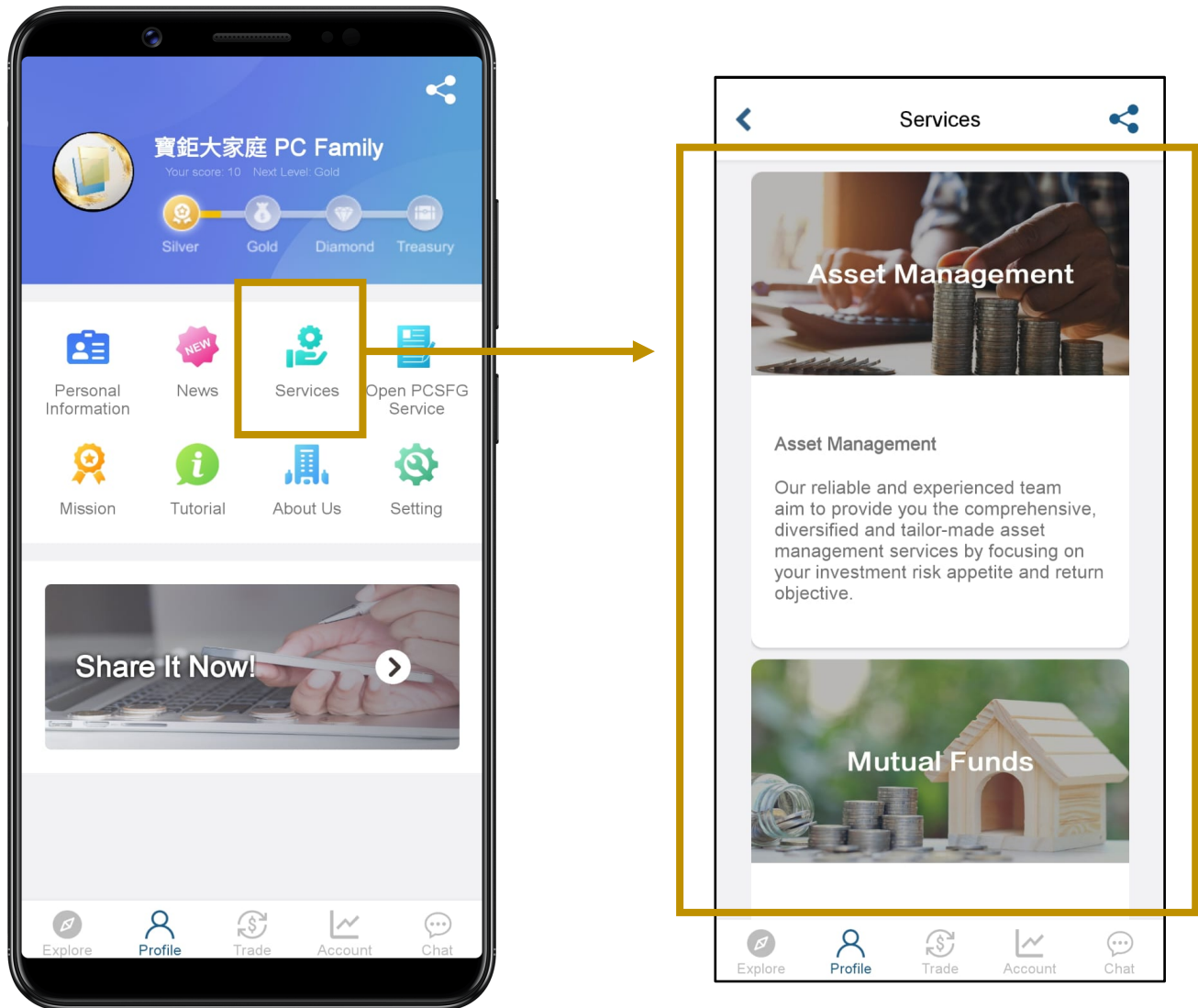
6.3 News

Users can keep abreast of the latest development of PCSFG on "News" tab.

6.4 Services

User can explore different range of PCSFG products and services on "Services" page.
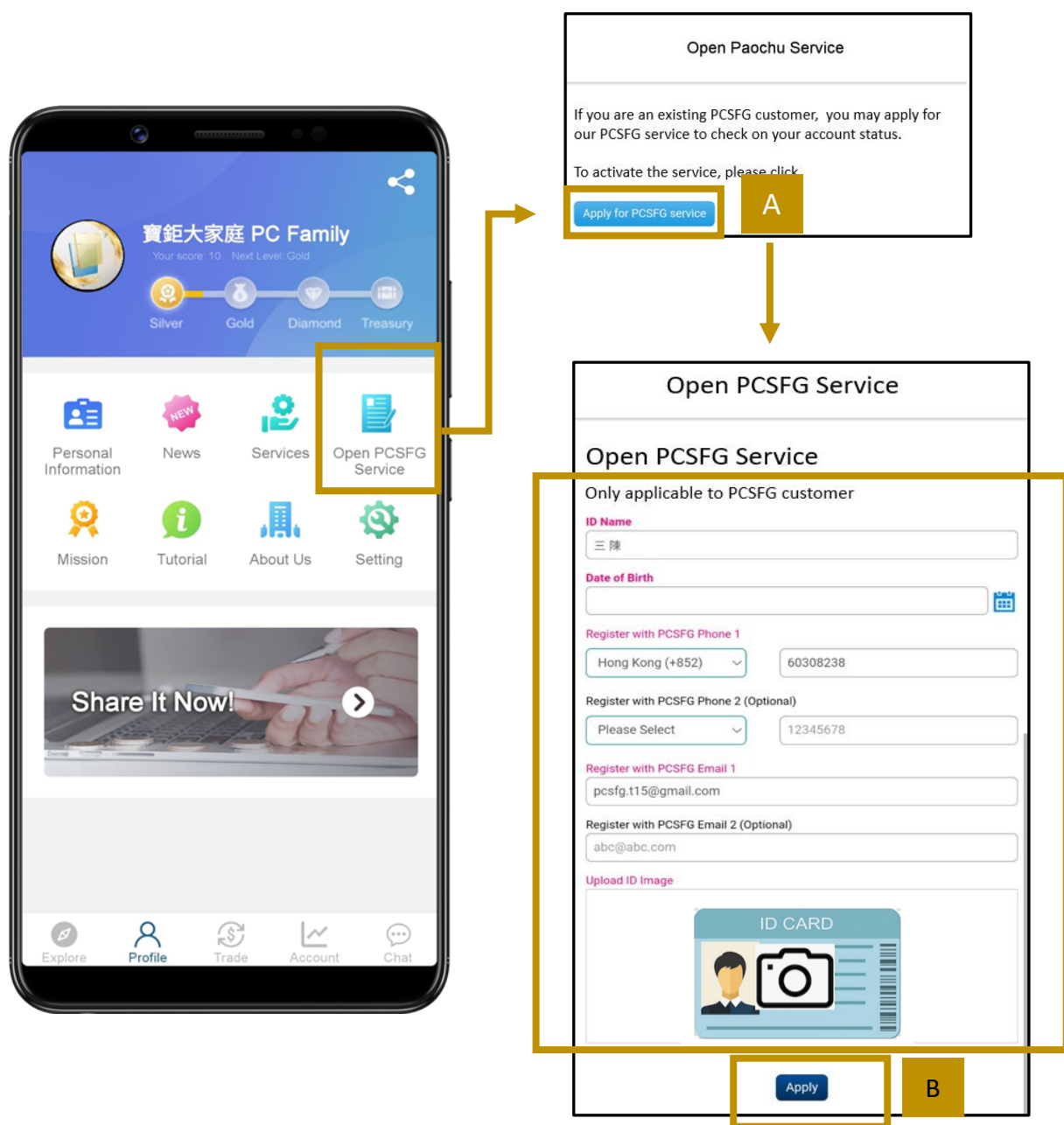
6.5 Open PCSFG Services

If existing PC Securities customers who wish to view their account details on the APP, please apply "Open PCSFG Services".

(A) Tap on "Open PCSFG Service, select "Apply for PCSFG Service"
(B) Fill in the information and upload ID. Click "Apply" to complete application.
    Note: All fields are mandatory to complete the application process.
(C) The application process will take 3 working days and applicant will receive both email and mobile push notification regardless successful or not.

Open Paochu Service

If you are an existing PCSFG customer, you may apply for our PCSFG service to check on your account status.

To activate the service, please click

Apply for PCSFG service

A

寶鉅大家庭 PC Family
Your score: 10   Next Level: Gold

Silver   Gold   Diamond   Treasury

Personal Information   News   Services   Open PCSFG Service

Mission   Tutorial   About Us   Setting

Share It Now!

Explore   Profile   Trade   Account   Chat

Open PCSFG Service

Open PCSFG Service

Only applicable to PCSFG customer

ID Name
三陳

Date of Birth

Register with PCSFG Phone 1
Hong Kong (+852)   60308238

Register with PCSFG Phone 2 (Optional)
Please Select   12345678

Register with PCSFG Email 1
pcsfg.t15@gmail.com

Register with PCSFG Email 2 (Optional)
abc@abc.com

Upload ID Image

ID CARD

Apply   B

Email Notification - Sample

Successful Application

Unsuccessful Application

Mobile Push Notification - Sample

Successful Application

Unsuccessful Application

6.6 Mission

On the "Mission" page, Users may gain points through completing different activities levels, users will advance to different levels of membership with the accumulated points.
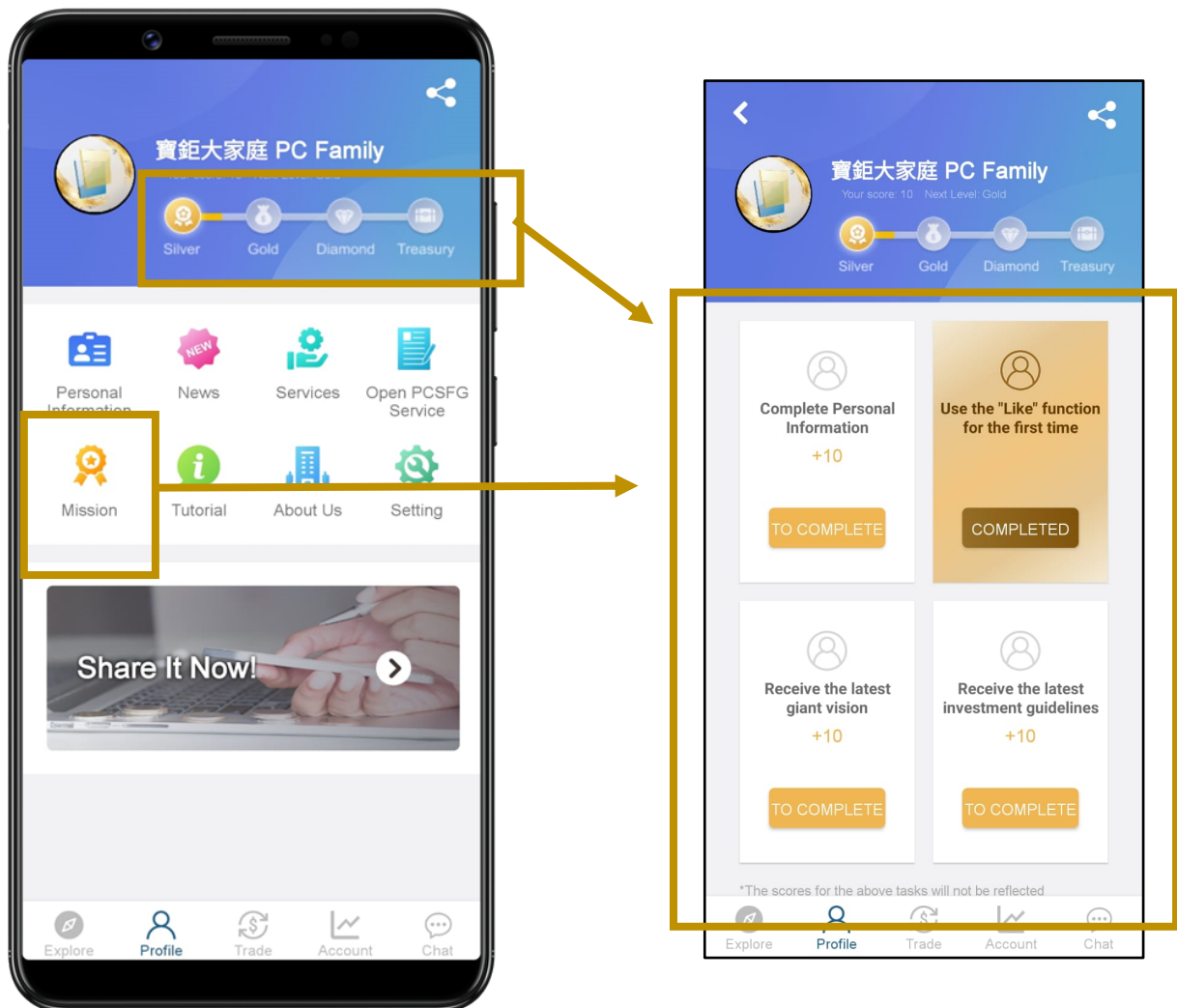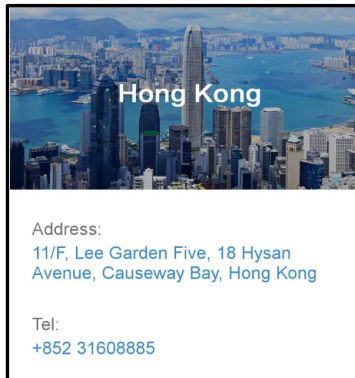
6.7 Tutorial

User may refer to "Tutorial" that provides guidelines on the features and functions of the APP. Simply swipe left or right or click "Next" to view the tutorial.

6.8 About Us

To know more about PCSFG business and services, user may tap on **"About Us"** page, to check out any of our offices and contact details.

Address:
11/F, Lee Garden Five, 18 Hysan Avenue, Causeway Bay, Hong Kong

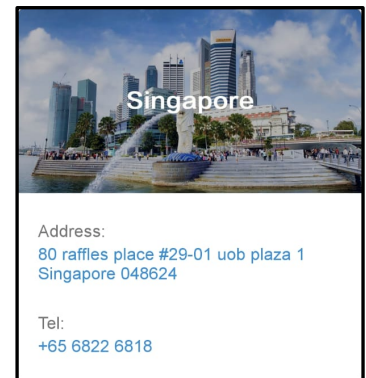Tel:
+852 31608885

Address:
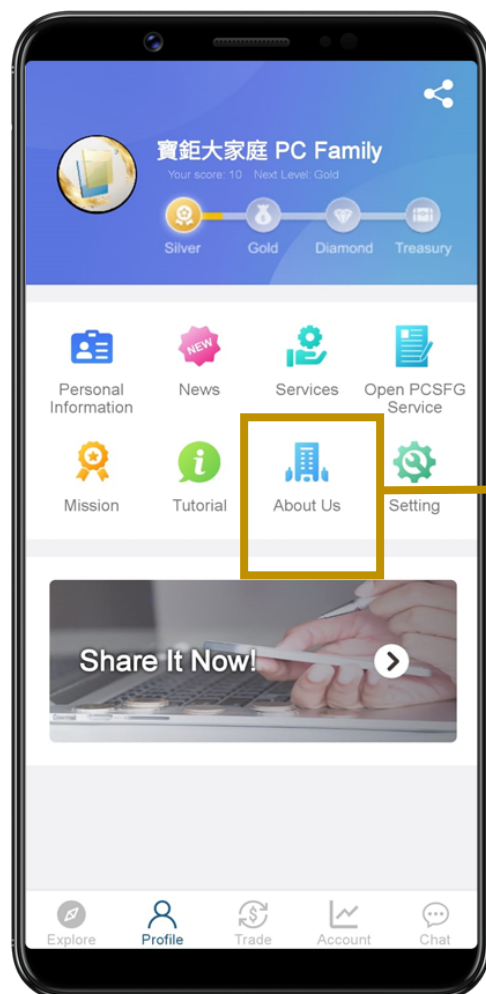Rm B, 55/F, Taipei 101 Tower, No. 7, Section 5, Xinyi Road, Xinyi District, Taipei City, Taiwan

Tel:
+886 2 8101 0025

Address:
80 raffles place #29-01 uob plaza 1 Singapore 048624

Tel:
+65 6822 6818

PC Securities Financial Group is founded in 2001 and has presence in Hong Kong, Singapore, Shanghai, Taiwan and Indonesia. We strive to provide our customers with professional, reliable and diversified financial products and services, including asset management, wealth management, securities, insurance, off-shore family trust, global properties, immigration and business consulting, etc. operating under relevant regulatory authorities.

6.9 Setting

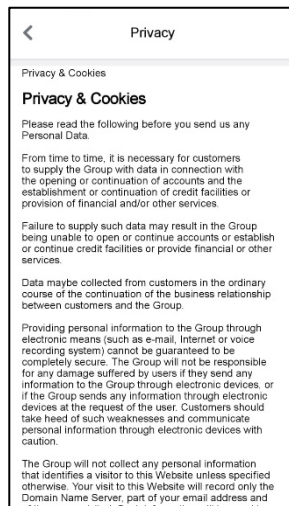Users can change the following basic settings in "Setting" page:

(A) Change system language (Bahasa Indonesia, English, Traditional Chinese and Simplified Chinese).
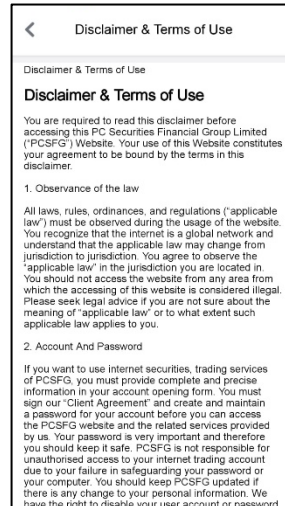(B) View Version, Privacy & Cookies, Disclaimer & Terms of Use or Logout.
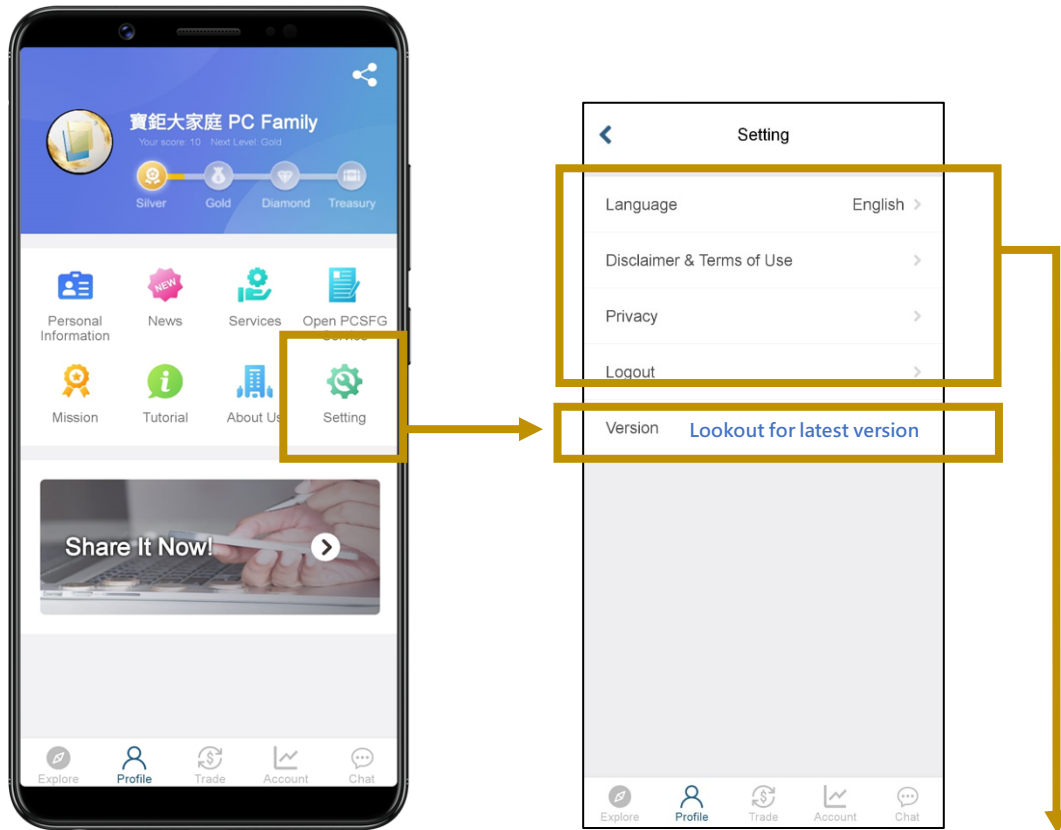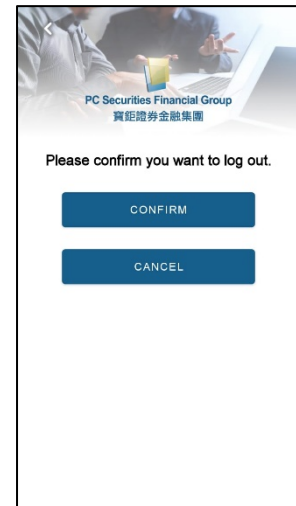

System Language Setting

View of Privacy & Cookies

View of Disclaimer & Terms of Use

Logout

7. Trade

Existing customers of PC Securities is able to select the type of transaction they would like to perform on the "Trade" page.

(A)   To perform trading, existing PC Securities customers may click on "Securities" banner and the system will redirect user to the PC Securities trading platform automatically.

(B)   For new customers who would like to create an account with PC Securities, simply click "Open an account now "banner, it will redirect your device to PC Securities website for account opening.

PC Securities Limited Website

PC Securities Trading Platform

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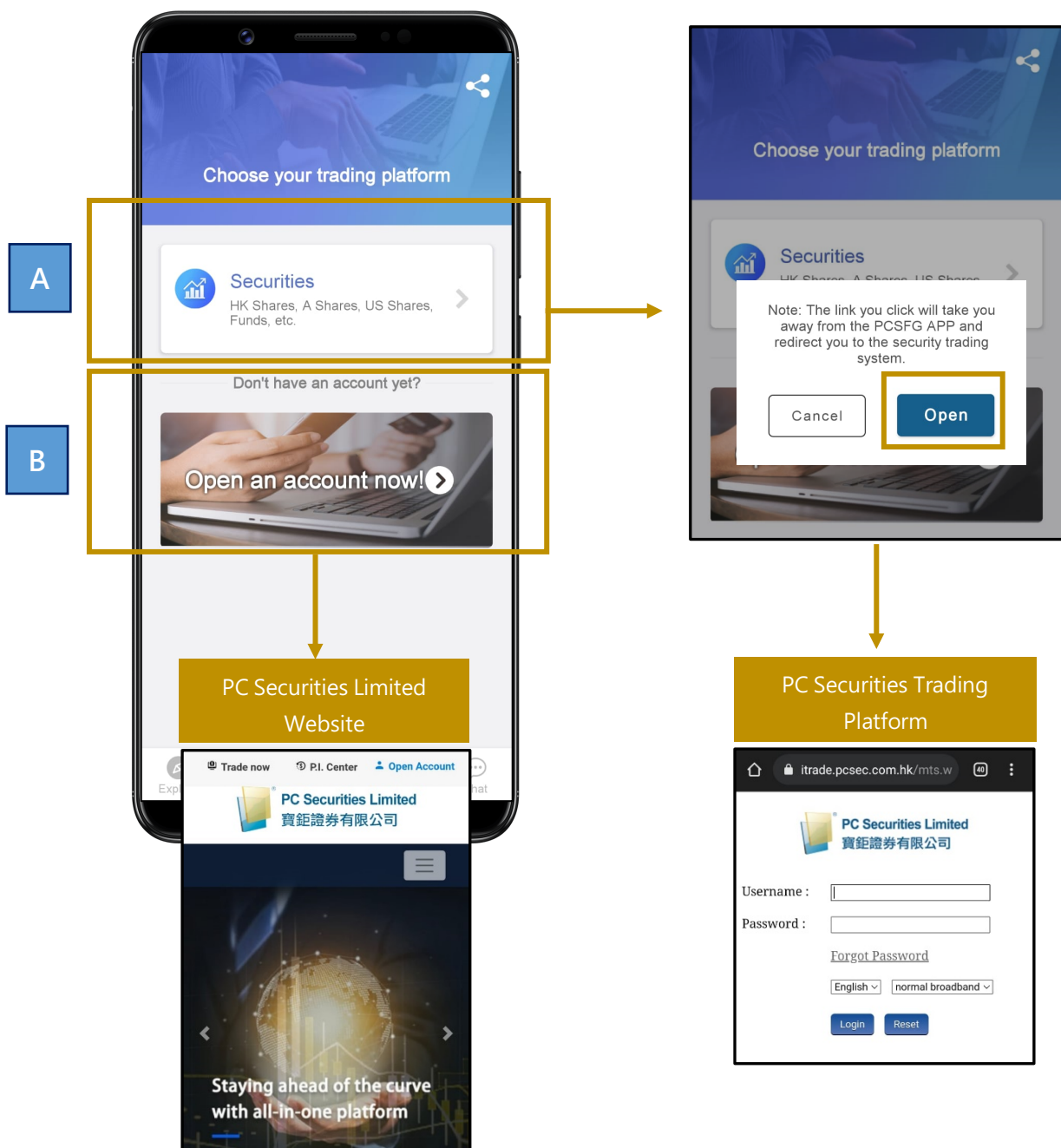
8. Account

Open an account and activate the PCSFG mobile service, then you can view your customized investment portfolio and monitor all transactions anytime, anywhere. Existing customers who have successfully applied "Open PCSFG Service" can enter the PCSFG account password on the "Account" page.

(A) Existing clients who wish to view their account details may apply through "Open PCSFG Service" page

(For application guide, may refer to **"6.5 Open PCSFG Services")**

(B) Existing customers who have successfully applied "Open PCSFG Service" can enter the PCSFG account password on the "Account" page, confirm the terms by clicking on "Agree to Terms". The account information is divided into 3 different sections "Summary ", "Investment", and "Insurance" for customers to view account summary and product details.
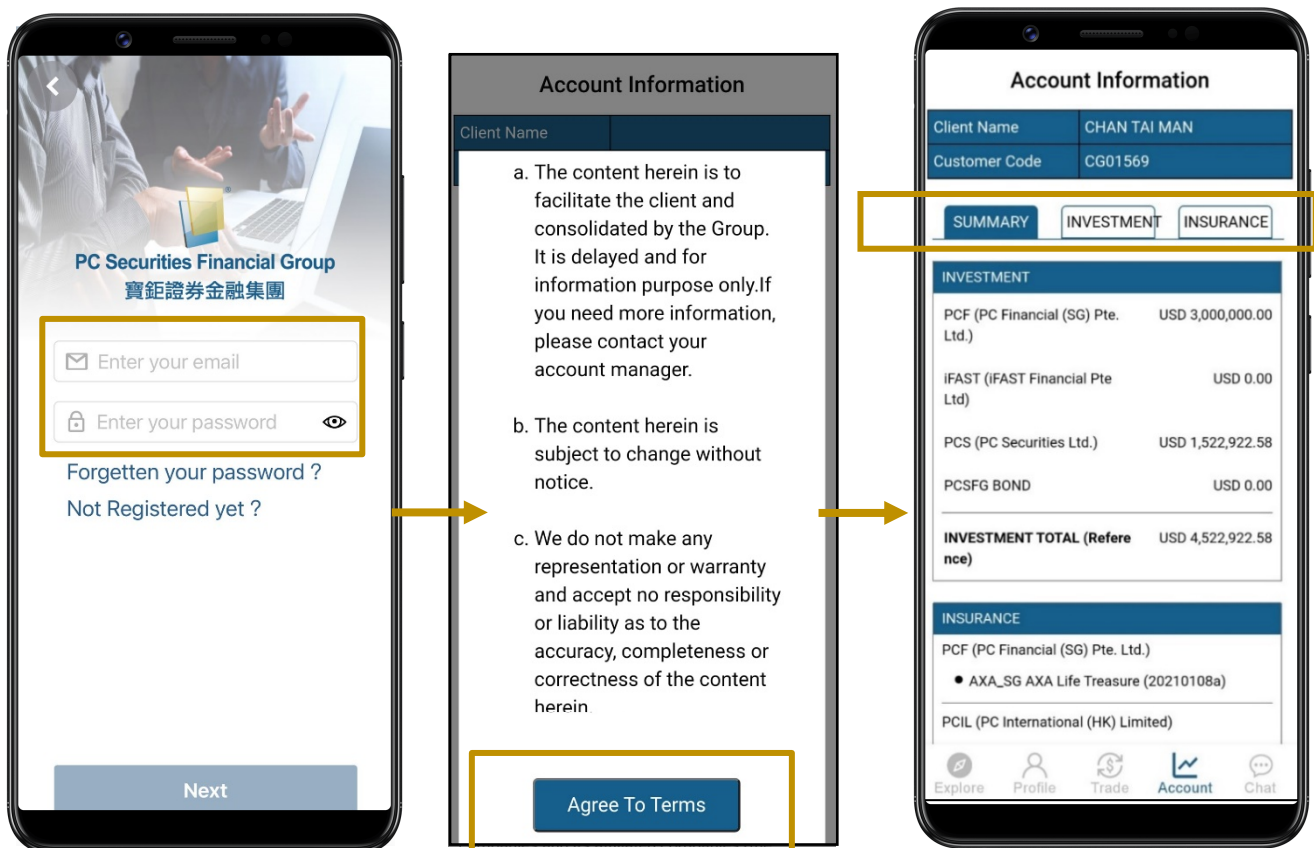
9. Chat

"Chat" is a communication channel with high level of privacy, allowing customers to directly enquire PCSFG product services, view past conversation history and any PCSFG related enquires anytime and anywhere. Chat system also enable user to send documents, photos and website link. Relevant CS response will be provided according to the language which was set by the customer's (Traditional Chinese, Simplified Chinese, English, or Bahasa respectively.
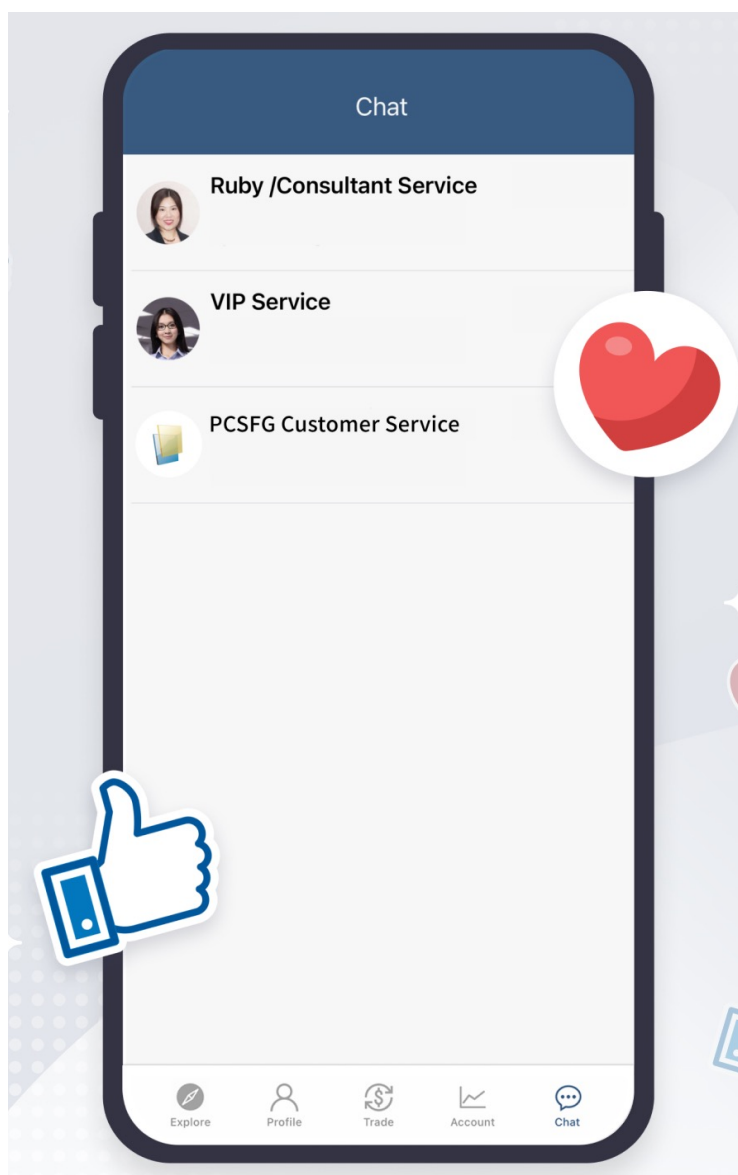
9.1 Chatroom

(A) Chat function allows users or clients to contact PCSFG Customer Service for any enquiries on Products, Services and others PCSFG related enquiries. Just simply tap on "Chat and click on Customer Service tab and you are able to chat. All conversation history will be saved in the chatroom.

Customer Service Chat Window

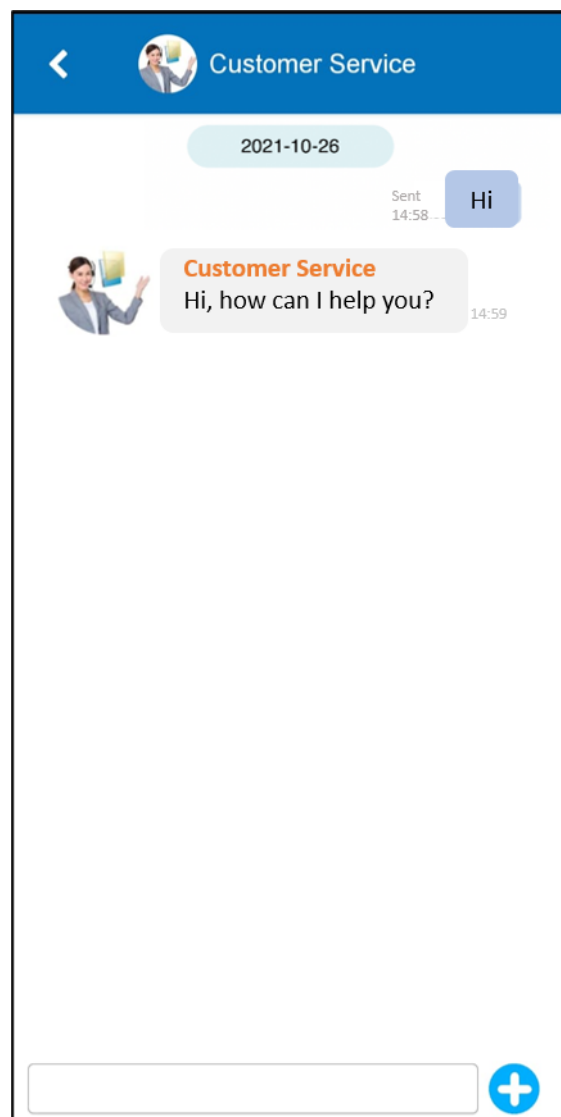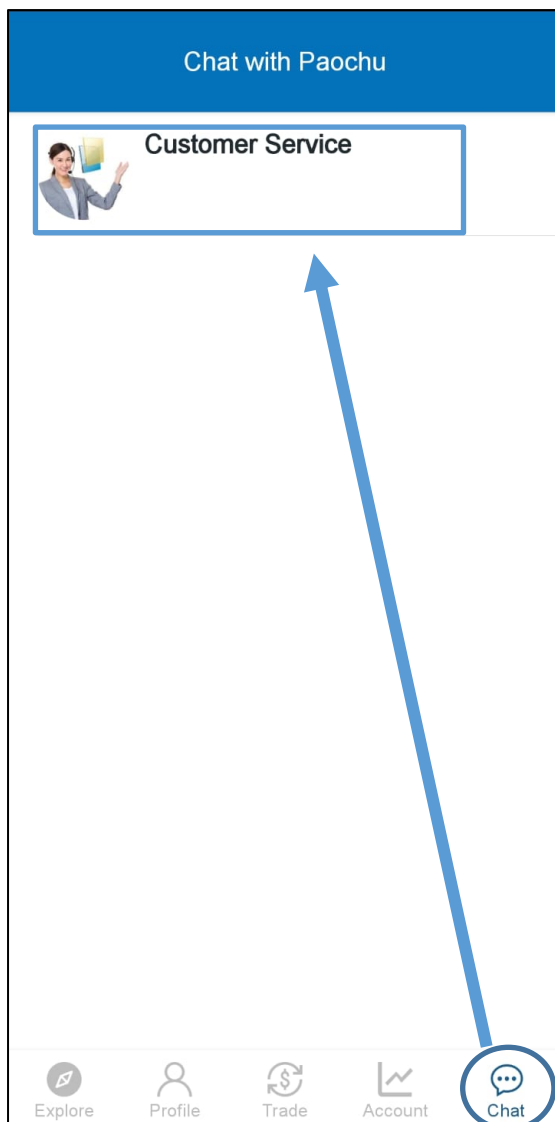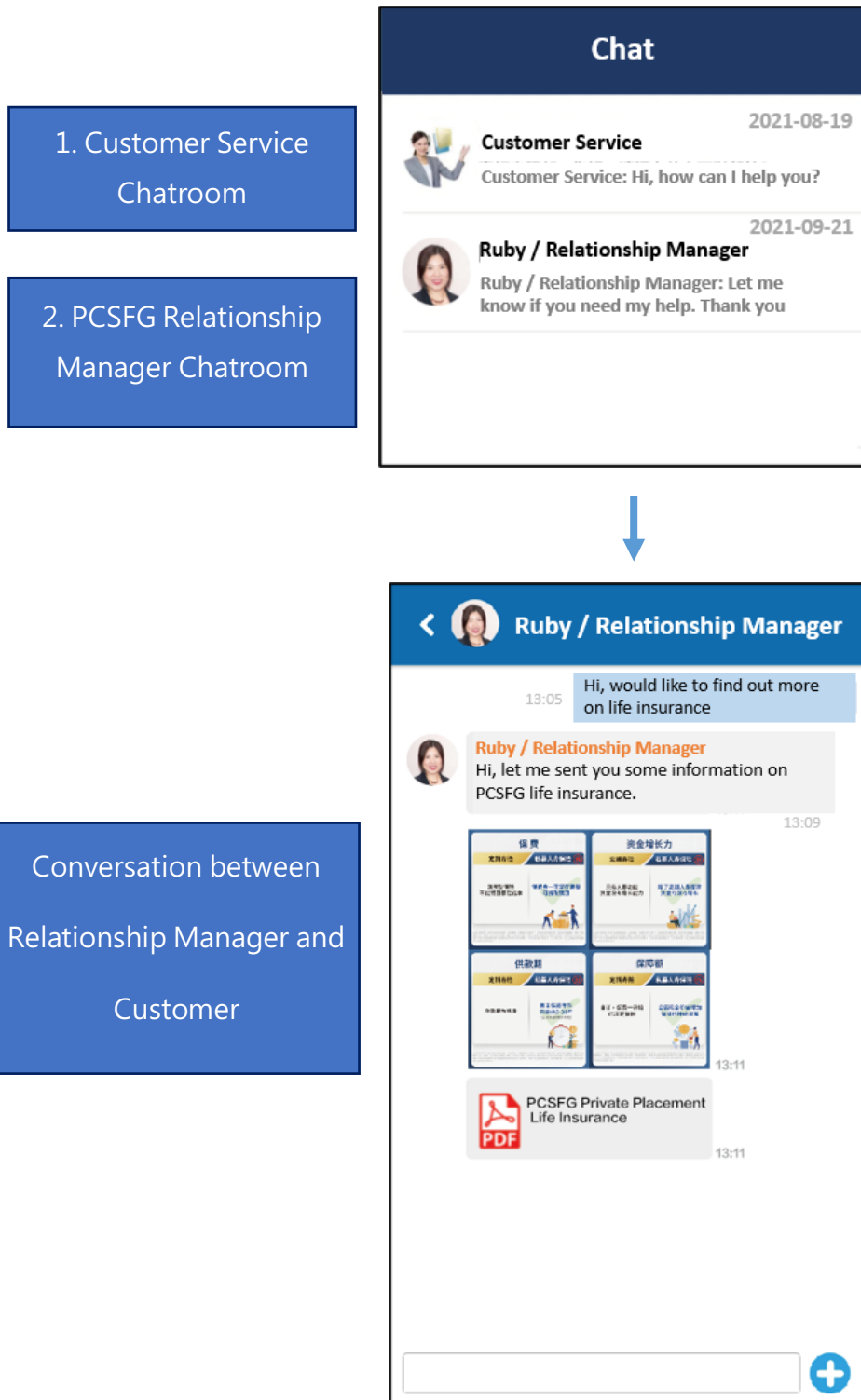(B) Existing customers of PCSFG who applied "Open PCSFG Service" successfully will have at least 2 chatrooms. In addition to the "Customer Service" chatroom, existing customers will also see the "Relationship Manager" chatroom. It allows customers to connect with his/her Relationship Manager for any product enquires directly. The content of the conversation will be displayed in each chatroom individually and all past conversations can be viewed.

1. Customer Service Chatroom

2. PCSFG Relationship Manager Chatroom

Chat

2021-08-19
Customer Service
Customer Service: Hi, how can I help you?

2021-09-21
Ruby / Relationship Manager
Ruby / Relationship Manager: Let me know if you need my help. Thank you

Conversation between Relationship Manager and Customer

Ruby / Relationship Manager

13:05 Hi, would like to find out more on life insurance

Ruby / Relationship Manager
Hi, let me sent you some information on PCSFG life insurance.
13:09

保費   資金增長力
供款期   保障額

13:11

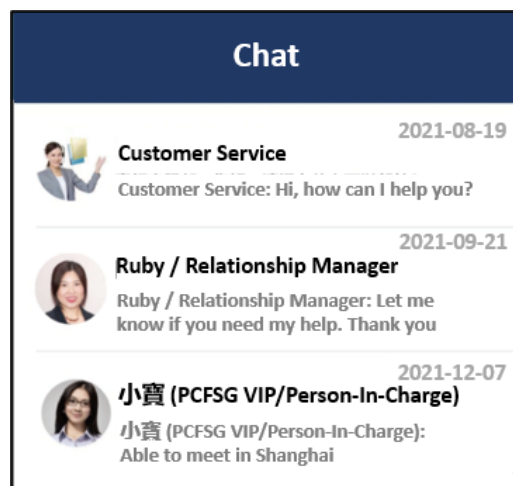📄 PCSFG Private Placement Life Insurance
13:11

(C) Existing PCSFG VIP customers with "Open PCSFG Service "will have at least 3 chatrooms. In addition to the "Customer Service" chatroom, existing VIP customers will also see the "Relationship Manager" chatroom and "VIP" chatroom. It allows VIP customers to connect with his/her Relationship Manager and dedicated VIP CS for enquires on product and services directly. The content of the conversation will be displayed in each chatroom individually and all past conversations can be viewed.
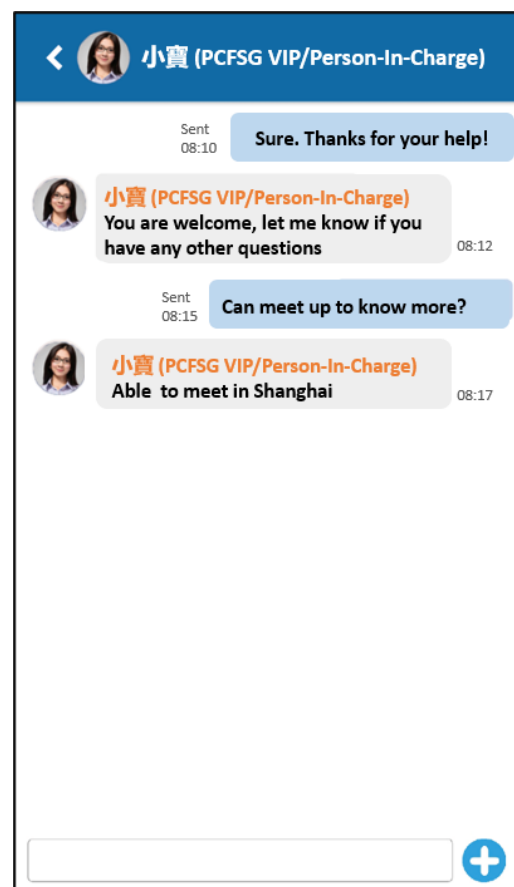
1. Customer Service Chatroom

2. PCSFG Relationship Manager Chatroom

3. 小寶(PCSFG VIP /Person-In Charge) Chatroom

Chat

2021-08-19
Customer Service
Customer Service: Hi, how can I help you?

2021-09-21
Ruby / Relationship Manager
Ruby / Relationship Manager: Let me know if you need my help. Thank you

2021-12-07
小寶 (PCFSG VIP/Person-In-Charge)
小寶 (PCFSG VIP/Person-In-Charge): Able to meet in Shanghai

Conversation between 小寶 (PCSFG VIP /Person-In Charge) and Customer

< 小寶 (PCFSG VIP/Person-In-Charge)

Sent 08:10   Sure. Thanks for your help!

小寶 (PCFSG VIP/Person-In-Charge)
You are welcome, let me know if you have any other questions   08:12

Sent 08:15   Can meet up to know more?

小寶 (PCFSG VIP/Person-In-Charge)
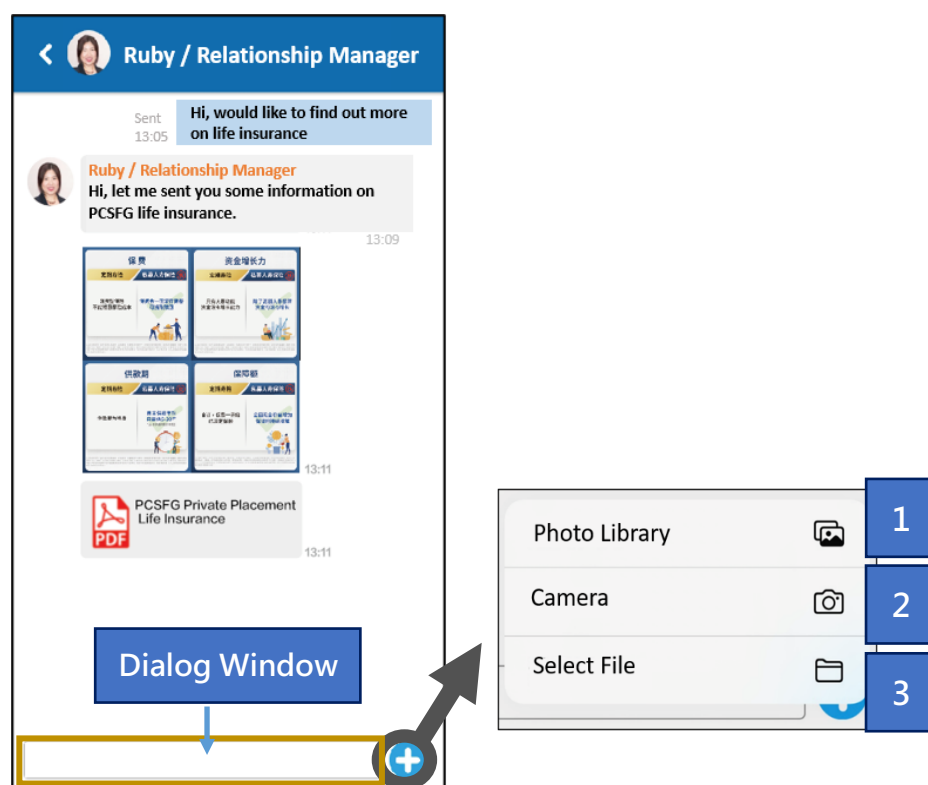Able to meet in Shanghai   08:17
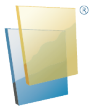
9.2 Chat Features

Aside from sending text, user may also send photos and files by tapping on the "**+**" button.

1. "Photo Library": Select the photos you would like to send.
2. "Camera" : Enable user to take instant photo.
3. "Select File:Click the file that you would like to send.

(Supported file formats .pdf, .doc, .docx, .xls, .xlsx, .ppt, .pptx, jpg, .jpeg, .png)

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PC Securities Financial Group
寶鉅證券金融集團

If you have any questions about the "The Rich Life" APP, please contact our customer service department. Thank you for your support to PC Securities Financial Group!

PC Securities Financial Group

Telephone：+852 3160 8885

Fax：+852 3160 8876

Email：info@pcsfg.com.hk

URL：www.pcsfg.com/

Website：http://www.pcsfg.com/

Linkedin：https://hk.linkedin.com/company/pc-securities-financial-group

Youtube：https://www.youtube.com/c/PCSecuritiesFinancialGroup