

Member's Choice Platform of New Pension Scheme for Private Schools Faculties

Help Me

Corporate Trust Dept.

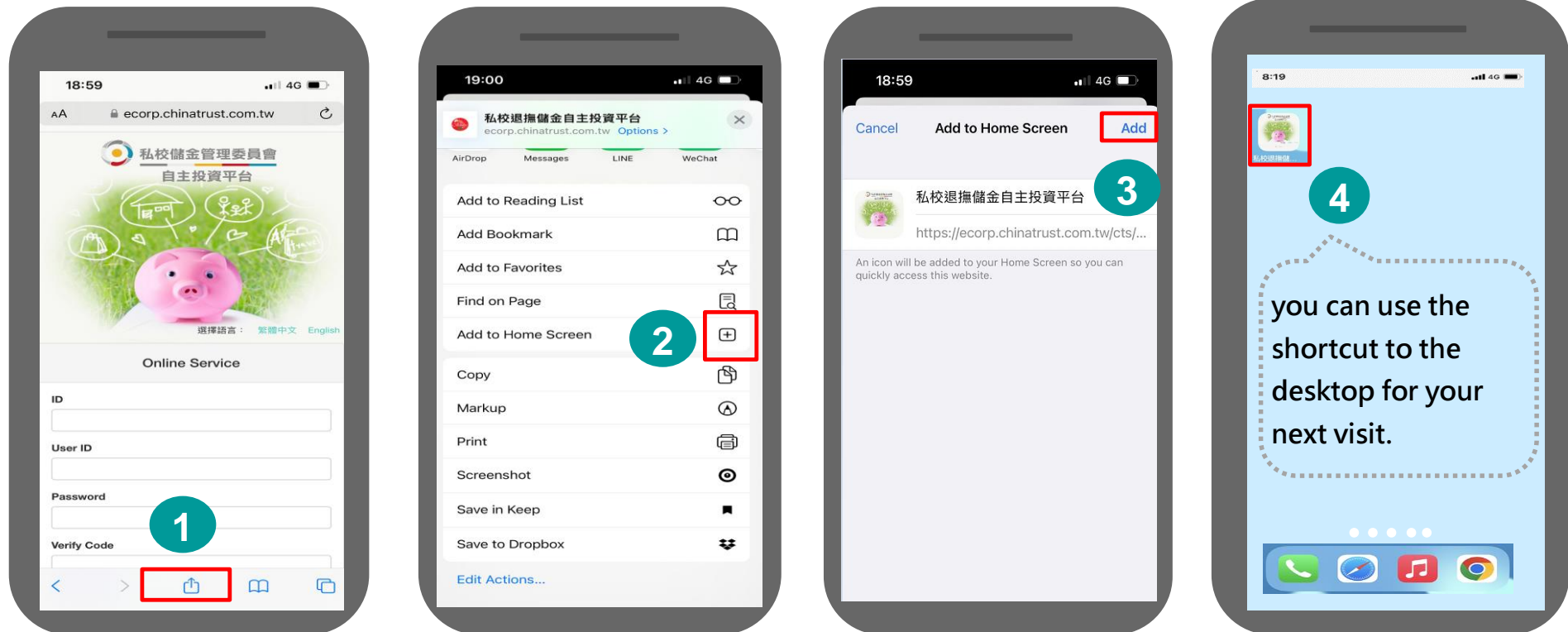


中國信託銀行
CTBC BANK

Using “Add to Home Screen” to create a shortcut to the desktop

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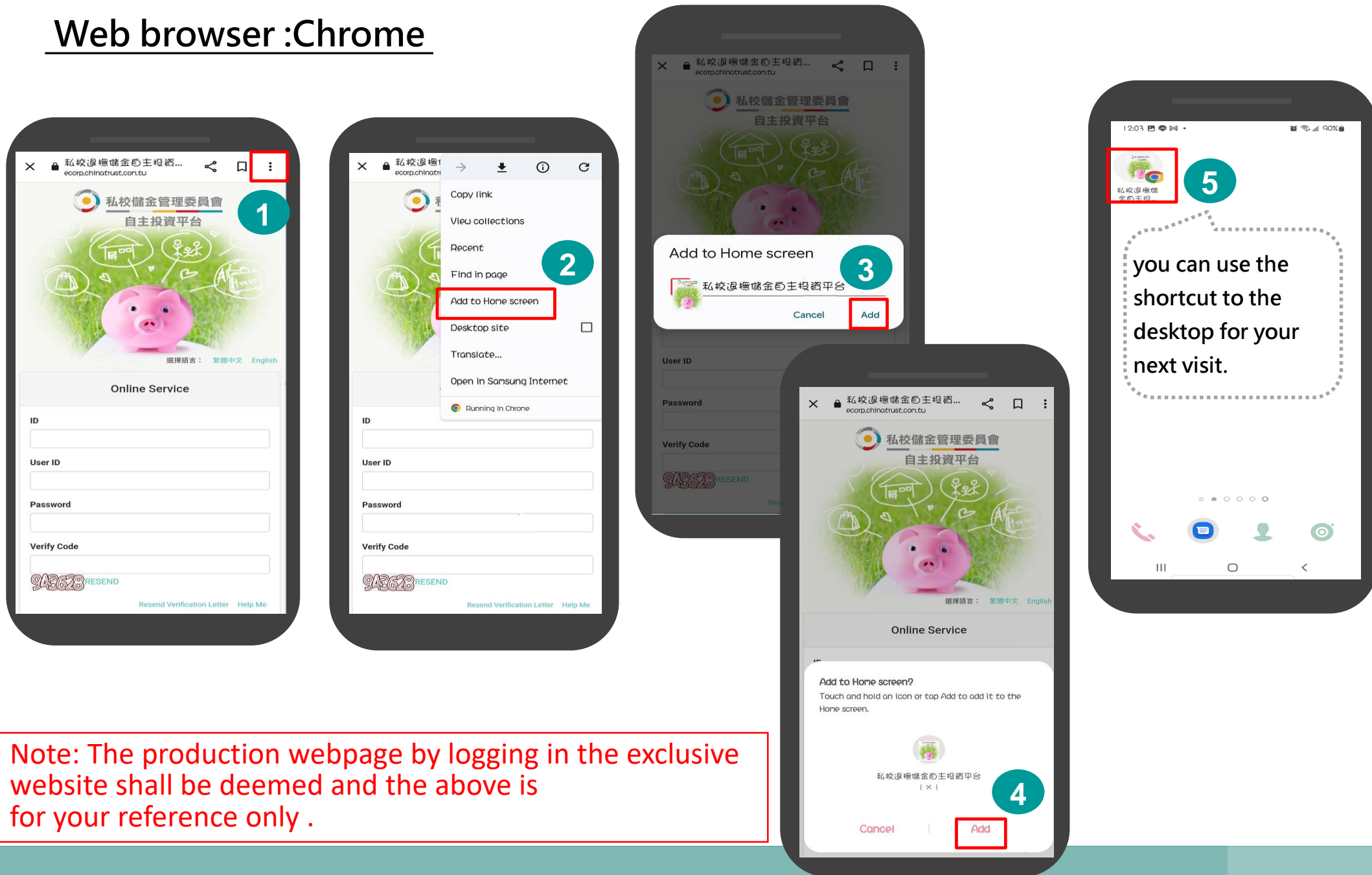
Web browser :Safari



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

Using “Add to Home Screen” to create a shortcut to the desktop

Web browser :Chrome



Initial Investment

Step1. Complete “Risk Tolerance Questionnaire”

❖ Click “Questionnaire” and answer the questions

私校儲金管理委員會
自主投資平台

Details Inquiries Questions Download Preference **Questionnaire** Account Logout

Risk Tolerance Questionnaire

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.

Risk Appetite is Aggressive	Date of last update is: 2017-08-08
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Step 1 Acknowledgement

Step 1 Step 2 Step 3

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.

☐ Yes ☐ No

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Step 2. Back to “Details”

❖ Back to “Details” then click “Change”

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自主投資平台

Details Inquiries Questions Download Preference Questionnaire Account Logout

Investment Performance Overview

Up to 2017/6/23

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%				
Conservative Portfolio	1,035,897	1,015,886	-20,011	-1.93%	Inquiry	Change	Setting	transform
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

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

Step 4. Process “Member’s Choice”

❖ Choose one of the Portfolio corresponding with your risk appetite

私校儲金管理委員會 自主投資平台

Details Inquiries Questions Download Preference Questionnaire

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"/>		Aggressive Portfolio	Aggressive
<input checked="" type="radio"/>		Lifecycle Portfolio 036-040	
<input type="radio"/>		Conservative Portfolio	Conservative
<input type="radio"/>		Stable Portfolio	Stable

Save Cancel

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Q&A

1. How to apply for User ID and Password ?

How to apply for User ID and Password

Step 1. You can ask the school you serviced to apply a new free member by batch for you.

Step 2. CTBC Bank will Email a specific verification letter to the appointed Email box within one week after receiving the complete documents from the school.

Step 3. You can set up your own User ID and Password following the instruction as the specific verification letter.



Q&A

2. How to log in Member's Choice Platform ?

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



私校儲金管理委員會
自主投資平台

Online Service

ID

User ID

Password

Verify Code

649038 RESEND

Resend Verification Letter Help Me LOGIN

CLIENT SERVICES

Our client service time is Weekday 9:00-17:30
E-banking and Accounts Inquiries 02-2558-012
Fund Management Committee for Private School
Faculties 02-2396-2880
Investment Consulting
02-2706-0759(psf@mail.ctfund.com.tw)

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

The screenshot displays the 'Private School Faculty Investment Platform' (私校儲金管理委員會 自主投資平台). The top navigation bar includes links for Details, Inquiries, Questions, Download, Preference, and Questionnaire, along with an Account menu and a Logout button. The main content area shows the 'Current account value' as NT\$ 975,654. Below this, a table lists two accounts: 'Faculty Savings Trust Account' (NT\$ 799,290) and 'Additional Contribution Trust Account' (NT\$ 176,364). A red dashed box highlights these accounts, with a red circle containing the number '4' and an arrow pointing to a yellow 'Choose Account' button. A note at the bottom of the table area states: 'Please click the "Account" if you would like to inquiry account details or transfer portfolios.'

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.

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

Back to “Details”

Investment Performance Overview Others Display All Display ▾

Up to 2017/8/23

Portfolio	Accumulated Investment Amounts	Present Value	Profits and Losses	Rate of Return
Lifecycle Portfolio 036-040	14,473	10,607	-3,866	-26.71%
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SUBTOTAL	1,055,935	1,030,502	-25,433	-2.4%

Investment Details Member's Choice Performance Management Investment Adjustment

Inquiry Change Setting transform

Frequent Functions

NOTE (Click the note description)

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Q&A

3. How to change User ID and Password ?

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.

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Q&A

4. How can I do if I forgot my User ID and Password ?

Resend Verification Letter



私校儲金管理委員會
自主投資平台



Online Service

ID

User ID

Password

Verify Code

649038 [RESEND](#)

[Resend Verification Letter](#) [Help file](#) [LOGIN](#)

CLIENT SERVICES

Our client service time is Weekday 9:00-17:30

E-banking and Accounts Inquiries 02-2558-0128

Fund Management Committee for Private Schools
Faculties 02-2396-2880

Investment Consulting
02-2706-0759 (psf@mail.citfund.com.tw)

Click
“Resend Verification Letter”
on the homepage

Please insert your information as following :
ID 、 Birthday and applied e-Mail, then the
platform will resend the verification letter to
your applied e-Mail automatically as the
information you insert is correct.

私校儲金管理委員會
自主投資平台

繁體中文 English

Resend Verification Letter

Resend Verification Letter

ID

Birthday

e-Mail

[SEND](#) [Back](#)

**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.**

