

It's as easy as 1, 2, 3...

To submit a dealing request on Wealth Interactive

You can submit a dealing instruction in three easy steps on Wealth Interactive. It's seamless, convenient and efficient - you can submit your instructions at any time of day or night, wherever you are in the world.

You should always seek financial advice before submitting a dealing request.

Before we begin

Policy type	Policy reference	Policy status	Indicative value
Executive Investment Bond		Contract Issued	HKD 567,107.54

Select your policy from the homepage of Wealth Interactive.

Once on the policy page, select **'New Deal Instruction'** on the right of the **'Policy actions'** menu.

Step 1. Choose the type of deal instruction

Select whether to request a sell, buy and/or policy management.

Then read and agree to the declarations underneath and select next.

Step 2. Select the assets

To sell

Asset name	Available no. of units	Indicative value	Dealing frequency	Sell % of units	Sell no. of units	Indicative sell amount	Indicative residual value	Select currency	Indicative sell amount
	100.000000	USD 19,099.00	Daily	40 %	40	USD 7,639.60	USD 11,459.40	GBP	5,928.65
	505.678000	JPY 1,362,534.00	Daily			JPY	JPY 1,362,534.0	GBP	

If you have requested a sell, all assets held will display. Enter either a percentage, number of units or amount to be raised for any asset that you would like to sell. You can also raise funds in a different currency from the asset if required.

You may see one of these icons alongside assets:



If displayed, hover over the icon to show units which are blocked from dealing



If displayed, hover over the icon to view the price that the value is calculated on



If available, select to place a 'limit order' deal

Step 2. Select the assets (cont'd)

To buy

If you are requesting a buy, enter either the asset name, SEDOL code, or ISIN number to search for the asset. Then select **'Add asset(s)'** and repeat these steps until you have added all required assets.

If you want to invest in an asset you already hold, select the **'Existing assets'** tab and select which assets you want to purchase additional units of.

Step 3. Enter the amount to buy

Once you have selected the asset that you wish to buy, scroll down the page. Then either enter the desired percentage of the sale amount to invest, or enter a monetary amount.

The **'Advanced allocation'** option will allow you to choose how individual sale proceeds are invested.

If you have any amount held in a transaction account, you can use the **'Manually manage accounts'** option to move cash between transaction accounts, e.g. to clear an overdrawn position.

After checking the summary, click on **'Submit'** at the bottom of the page. Your dealing instruction will now be acted on and you will see the contract notes on Wealth Interactive once we receive settlement.

If you need any help with Wealth Interactive, or have any questions, contact your financial adviser or visit : www.quilterinternational.com/wi

www.quilterinternational.com
www.quilterinternational.com/hk

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

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