

SMART. INTUITIVE. SECURE.

MY BROWN SHIPLEY

MOBILE USER GUIDE



BROWN SHIPLEY
A QUINTET PRIVATE BANK

WELCOME TO MY BROWN SHIPLEY

In a world that's always switched on, it's now more important than ever to have an accurate, up-to-date and complete picture of your portfolio, whenever you want it and wherever you are.

My Brown Shipley gives you instant access to keep track of your investments. It provides a complete picture of your portfolio and access to key documents, along with the smart tools, resources and secure messaging you need to stay in touch. It is available from your desktop, tablet or mobile device.

My Brown Shipley allows you to:

- **VIEW** your portfolio valuations, asset classes, positions and latest transactions
- **CUSTOMISE** reporting by combining portfolios to review performance
- **ACCESS** key documents to view and print valuations and performance data
- **MESSAGE** your Brown Shipley Adviser securely

My Brown Shipley is a secure platform that uses several layers of the latest encryption technology to protect your data and ensure your financial information is completely safe.

HOW TO LOGIN

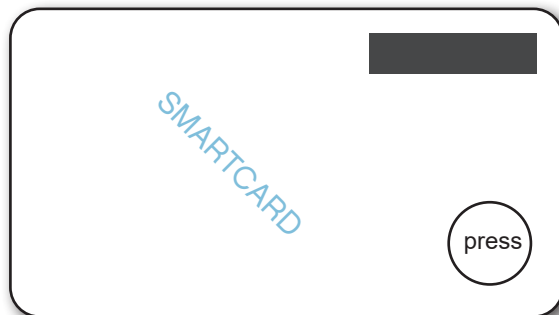
To access My Brown Shipley on your mobile device you will need:

1. Your username: (e.g. ES12345AB)*
2. Your PIN code**
3. Your Smartcard***

* Your username and Smartcard will be supplied via post.

** Your PIN code will be sent via a separate communication. On initial login you will be prompted to change your PIN code. You must choose a numerical six to eight digit code. For added security, the system will prevent you from using sequential (456789) or the same (111111) numbers. Please also avoid a number that easily identifies you, such as your date of birth.

*** When accessing My Brown Shipley via our dedicated App and you enable fingerprint/face ID authentication, your Smartcard will only be required for your initial login. Subsequent logins via the App will always ask for your PIN code and your fingerprint/face ID authentication to enable you to access the App. If you choose not to use fingerprint/face ID authentication you will always need to use your Smartcard. Always keep your Smartcard in a safe place.



YOUR SMARTCARD CODE: Press the button in the bottom right corner of your Smartcard to generate a six-digit code. Enter all six digits in the Smartcard code field. Please note, the code is only valid for 15 seconds after which a new code will need to be generated.

HOW TO LOGIN

To access My Brown Shipley using your mobile phone or tablet device, download the App from the App Store or Google Play.

App software requirements: iOS 12.0.0 or later, Android 8.1.0 or later.



Enter the following information:

1 Username

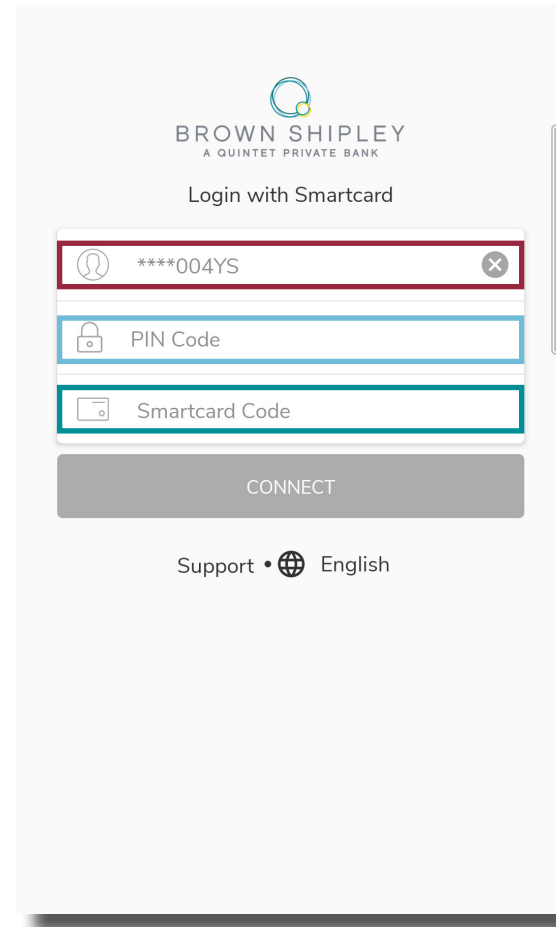
2 PIN Code

3 Smartcard Code

Once logged in, if you are an Apple user you will then be invited to activate fingerprint or face ID authentication.

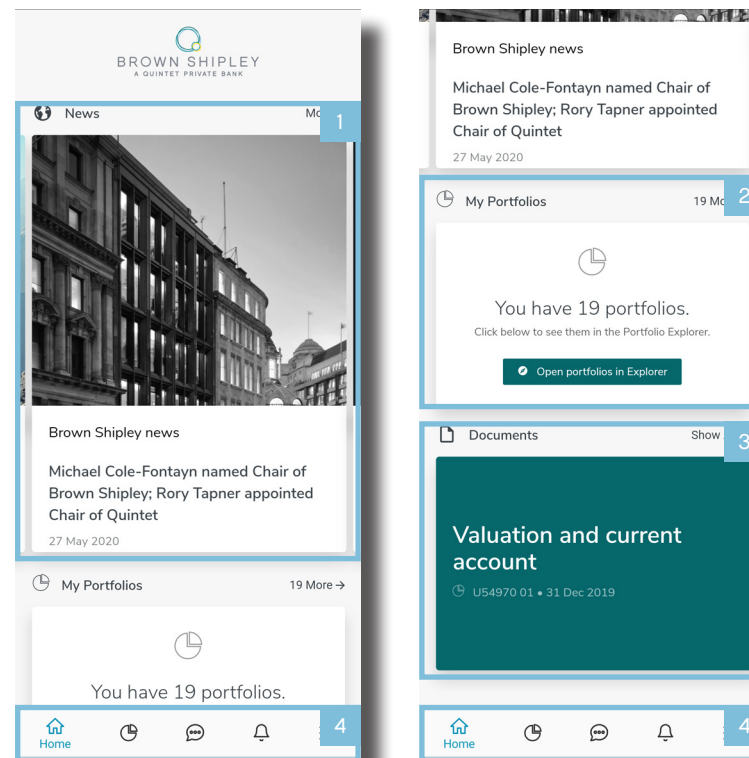
Fingerprint or face ID authentication can be activated/deactivated at any time via your App settings when you're logged in.

Once activated, you can just login using your fingerprint or face ID, and PIN code without needing your Smartcard.



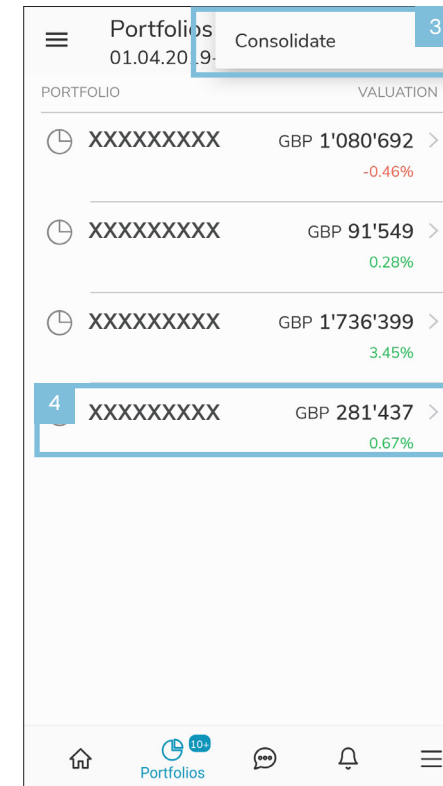
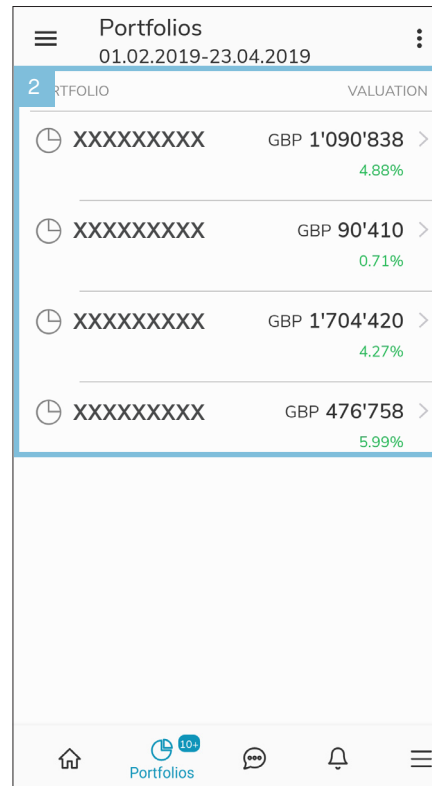
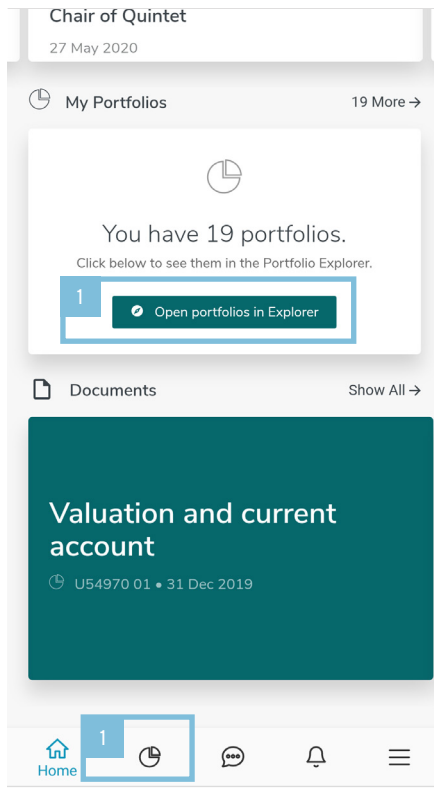
Homescreen

- 1 Find the latest news articles published online by Brown Shipley, our publications and investment analysis.
- 2 View your portfolio(s)
- 3 View your documents (for clients who are paperless)
- 4 Main menu bar which allows you to navigate to anywhere across the app. You will also see notifications of any activity within your account here.



VIEW YOUR PORTFOLIOS

- 1 From the App home screen click on the Portfolios button.
- 2 You can view your portfolios individually.
- 3 Or you can consolidate them to get an overview of multiple portfolios.
- 4 If your portfolios are managed or reported on a 'grouped' basis, a fixed consolidation view of these portfolios will be available to access – these portfolios are prefixed with 'ZU'



PORTFOLIO - DASHBOARD

The dashboard displays:

1 Portfolio Evolution

2 Portfolio Performance

3 Latest Security Transactions

4 Last Cash Movements

XXXXXXX
01.04.2019-29.05.2019

Dashboard Positions Transactions

Evaluation as of 29.05.2019

GBP 1'080'242

TW Perf.: -0.51%

Evolution 1

Deposits	0
Withdrawals	0
Loss (incl. Income)	-5'501
Total Start of Period	1'085'743

Performance

Home Portfolios 10+ Messages Notifications Menu

XXXXXXX
01.04.2019-29.05.2019

Dashboard Positions Transactions

Gain (incl. Income) 360

Total Start of Period 91'291

Performance 2

Short Term Long Term

31 Mar 18 Apr 08 May 28 May

Last Security Transactions

DATE / TYPE QUANTITY

Home Portfolios 10+ Messages Notifications Menu

XXXXXXX
01.04.2019-29.05.2019

Dashboard Positions Transactions

Last Security Transactions 3

DATE / TYPE	QUANTITY
2019	
26 Mar Other Transactions UNILEVER PLC	370
11 Feb Other Transactions BP	700
11 Feb Other Transactions BAE SYSTEMS	730
11 Feb Other Transactions UNITED UTILITIES GROUP	460
11 Feb Other Transactions DS SMITH	1'150

Show all transactions

Home Portfolios 10+ Messages Notifications Menu

XXXXXXX
01.04.2019-29.05.2019

Dashboard Positions Transactions

11 Feb Other Transactions BAE SYSTEMS	730
11 Feb Other Transactions UNITED UTILITIES GROUP	460
11 Feb Other Transactions DS SMITH	1'150

Show all transactions

Last Cash Movements 4

DATE / TYPE	CURRENCY & AMOUNT
2019	
29 Mar Deposits	GBP 2'483

Current Account Balance: 2019-05-02

Home Portfolios 10+ Messages Notifications Menu

LOAN-TO-VALUE

With this functionality you can get insight in to your potential loan amount. This section will only be available for clients with eligible security portfolios where they are of sufficient value to enable lending (a minimum of the sterling equivalent of €500k)

1 Estimated loan amount potential

2 A link to more information via the lending information page

The screenshot shows a mobile application interface with a navigation bar at the top containing 'Dashboard', 'Positions', and 'Transactions'. Below this is a table with the following data:

Evolution	
Deposits	10'500
Withdrawals	-64'692
Gain (incl. Income)	207'623
Total Start of Period	2'343'928

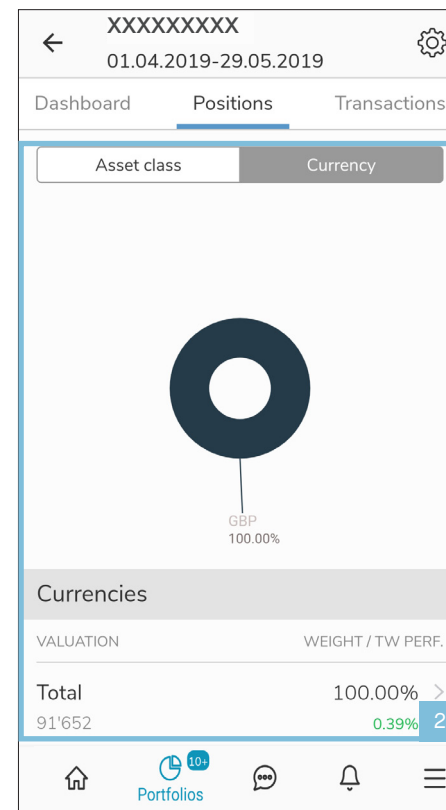
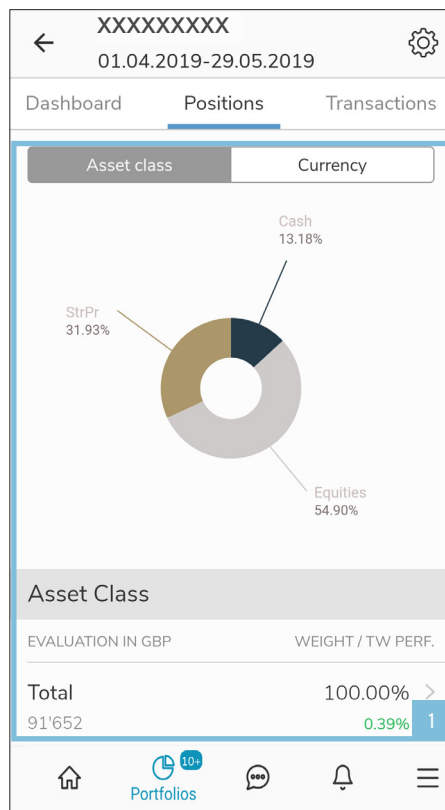
Below the table is a 'Lending' section with an information icon. The 'Estimated loan potential' is 312'186. Below this is a disclaimer: 'The amount shown is indicative and is only based on the pledge value of your investment portfolio to which a haircut is applied. This amount does not take into account your personal circumstances. The bank will assess whether a loan is suitable for you.' Below the disclaimer is the text 'Interested in our tailor-made lending solutions?' and a button labeled 'I'm interested →'. At the bottom of the screen is a navigation bar with icons for Home, Portfolios, Messages, Notifications, and a menu icon.

All lending is subject to qualifying criteria

PORTFOLIO - POSITIONS

1 Display the detailed breakdown of your portfolio by Asset Class.

2 Or by Currency.



PORTFOLIO - TRANSACTIONS

1 Find the transaction history for the selected portfolio using the 'Transactions' tab.

2 This displays the securities and cash movements as well as pending orders.

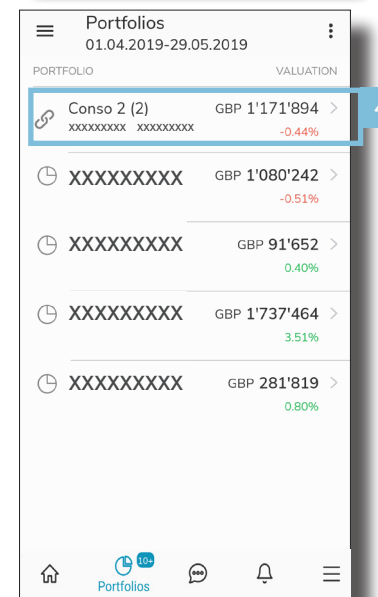
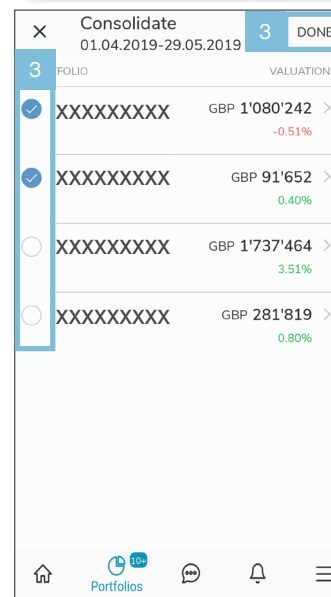
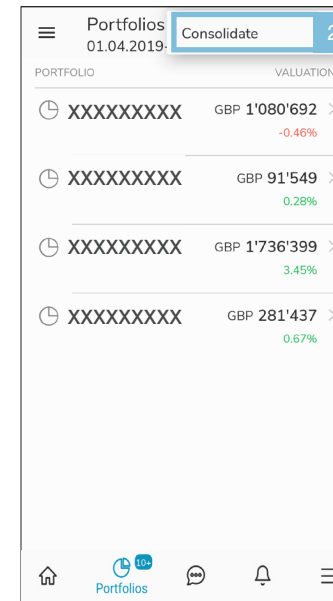
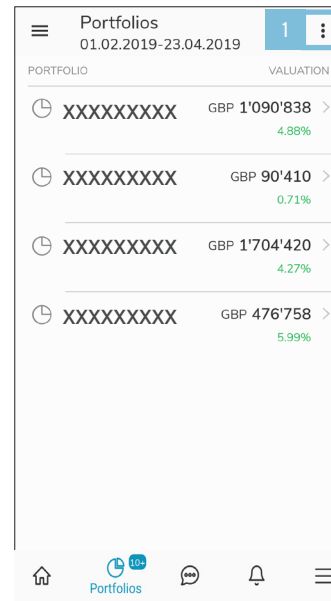
DATE / TYPE	QUANTITY
2019	
27 Mar Sales 7%CS-2 IDX BSKT 20	-63'000 >
2018	
18 Dec Other Transactions LEGAL & GENERAL	10'605
17 Dec Other Transactions HSBC HOLDINGS	3'715
17 Dec Other Transactions TESCO	6'250
17 Dec Other Transactions RIO TINTO PLC	325

Show all transactions

CREATE CONSOLIDATED PORTFOLIOS

To consolidate your portfolios:

- 1 Click the ellipsis in the top right hand corner of the Portfolios page.
- 2 Click 'Consolidate' from the drop down menu.
- 3 Tick the box beside those portfolios you wish to consolidate and then click 'DONE'.
- 4 You will then be able to view your consolidated portfolios alongside your individual portfolios.

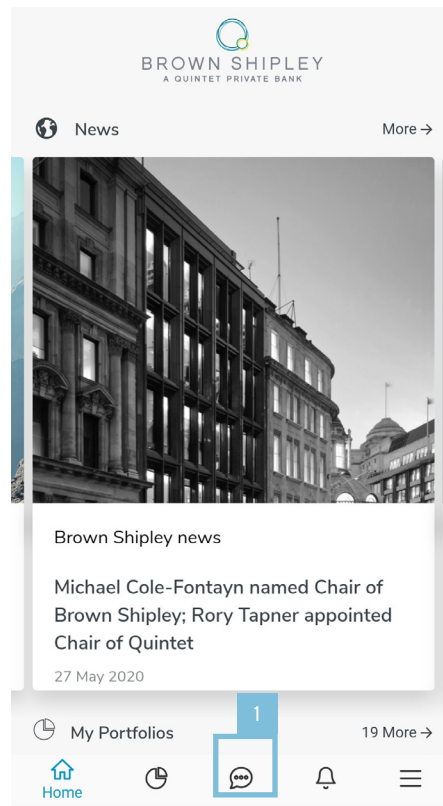


SECURE MESSAGING

My Brown Shipley provides you with a secure way to communicate with your Brown Shipley Adviser.

1 By clicking on the 'Messaging' icon on the main navigation you can contact your Brown Shipley Adviser via a secure, encrypted environment.

2 You will be able to send messages, view responses and access any conversation history. **Please note this is not a 'live chat' service and your Brown Shipley Adviser will respond to you as soon as possible.**



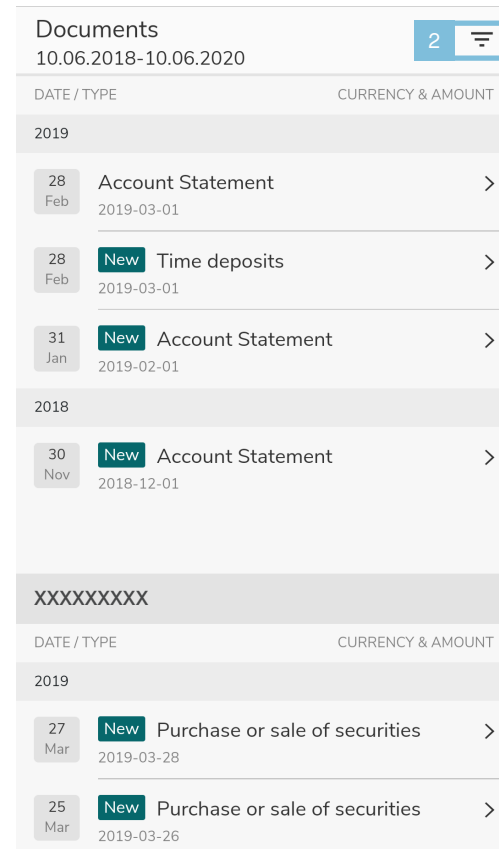
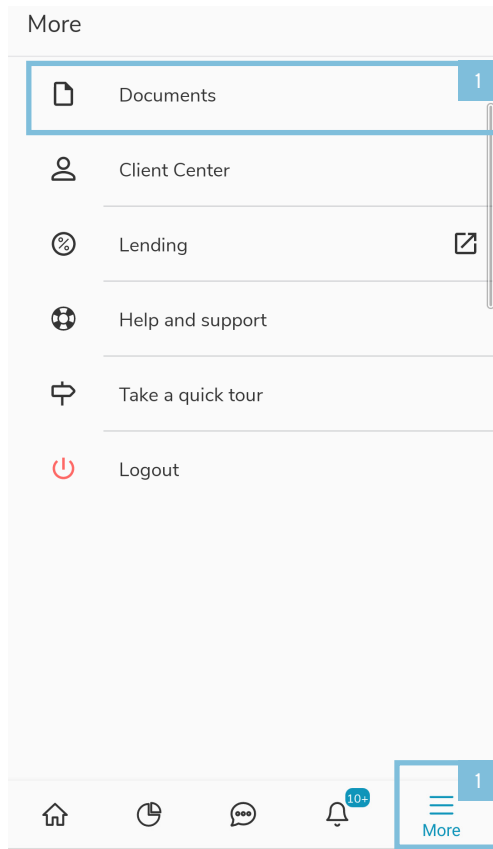
DOCUMENTS

1 If you have chosen to go paperless you can access documents applicable to your linked portfolios - including valuations, account statements and purchase or sale notifications by clicking on more and then the 'Documents' icon from the navigation screen.

2 You can filter the documents listed (by timeframe or document type) by clicking the filter icon.

You will be notified of new documents via email. Documents can be downloaded and shared if required.

If you have agreed a grouped portfolio report your valuation will be accessible under the 'ZU' group reference.



CLIENT CENTER

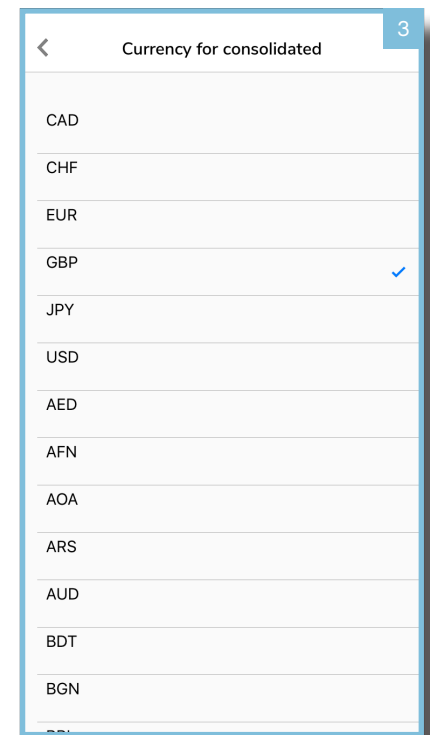
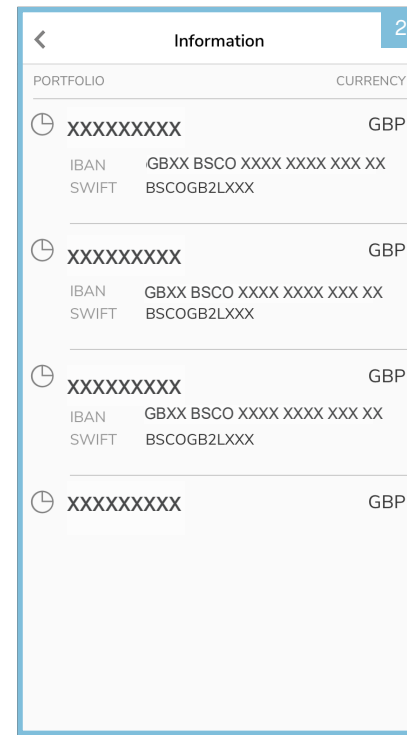
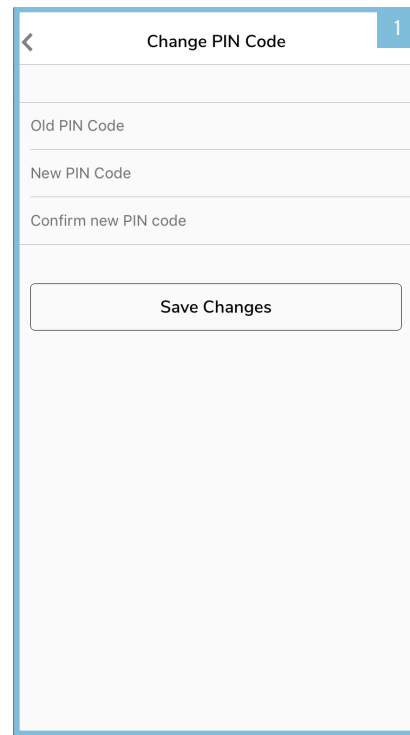
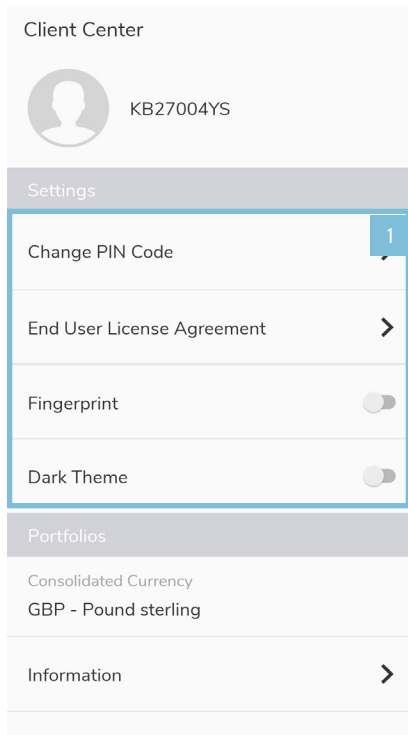
This area enables you to view and amend the following:

Settings

- 1 Change your PIN code, finger print and theme settings.

Portfolios

- 2 View your Portfolio, IBAN and Swift details
- 3 Amend your Currency preference.

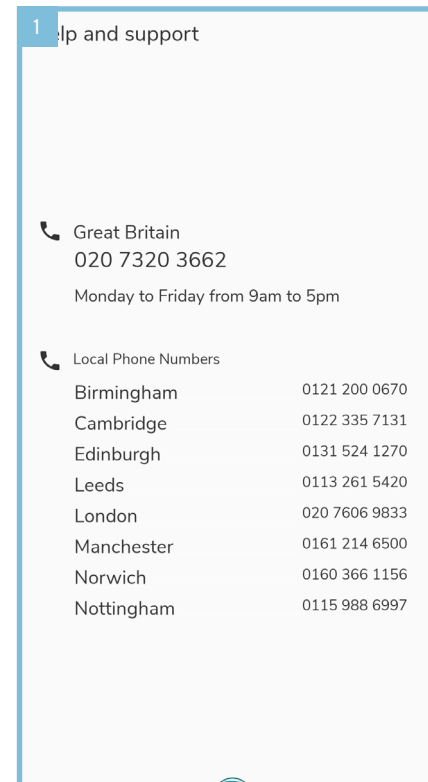
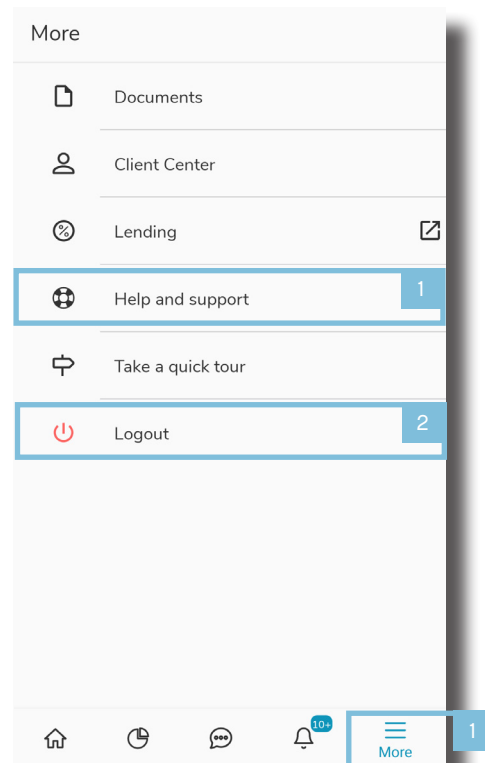


SUPPORT AND LOGOUT

1 If you need any assistance click the more icon and click 'Help and support' to view our support contact information.

2 To see the key features of the app click 'Take a quick tour'

3 To exit the App at anytime click the on the 'Logout' icon from the home screen.



HELPFUL TIPS AND SECURITY INFORMATION

- Do not share your PIN code with anyone or write it down. We will never ask you to disclose your PIN code or ask you to reset it
- Ensure you always login to My Brown Shipley via the dedicated link on our website or via the My Brown Shipley App
- If your device, Smartcard or PIN code are lost, stolen or compromised please contact us immediately on 0800 916 6911*
- Be alert to fraudulent emails claiming to be from Brown Shipley
- We will never email you requesting you to login to My Brown Shipley
- If you forget your username or PIN code please contact the My Brown Shipley helpline on 0800 916 6911* who will be able to help you
- Remember to always log out of My Brown Shipley. For security purposes, you will be automatically logged out after 10 minutes inactivity. This can be extended to 30 minutes via your settings in the Client Center
- Remember to change your PIN code regularly
- For further information visit the dedicated My Brown Shipley section of our website accessed via [brownshipley.com](https://www.brownshipley.com).

Contact Us.

If you have any questions about your My Brown Shipley account, please contact our dedicated helpline on 0800 916 6911* or by email to mbs.support@brownshipley.co.uk

For further information on My Brown Shipley or to view our 'How to login' video, visit the My Brown Shipley section of our website at [brownshipley.com](https://www.brownshipley.com)

* If calling from outside the UK please dial +44 207 320 3662.

IMPORTANT INFORMATION

This communication is provided for information purposes only, and is provided for the benefit of existing clients of the firm. It does not constitute an offer or recommendation to subscribe, to purchase, sell or hold any security or financial instrument.

Brown Shipley is a trading name of Brown Shipley & Co Limited, registered in England and Wales No. 398426. Registered Office: 2 Moorgate, London, EC2R 6AG. Brown Shipley's parent company is Quintet Private Bank (Europe) S.A which, from Luxembourg, heads a major European network of private bankers.

Information correct as at June 2019.

[MYBS MG61.20]