

SMART. INTUITIVE. SECURE.

# MY BROWN SHIPLEY

MOBILE APP 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 Client Advisor 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 – SMARTCARD

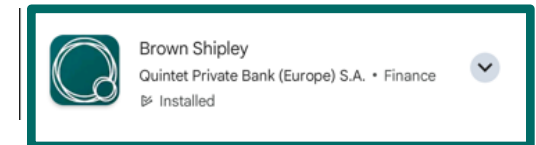
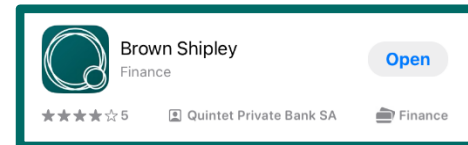
To access My Brown Shipley using your mobile phone or tablet device, download the Brown Shipley App highlighted below from the App Store or Google Play. App software requirements: iOS 13.0.0 or later, Android 10.0 or later.



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

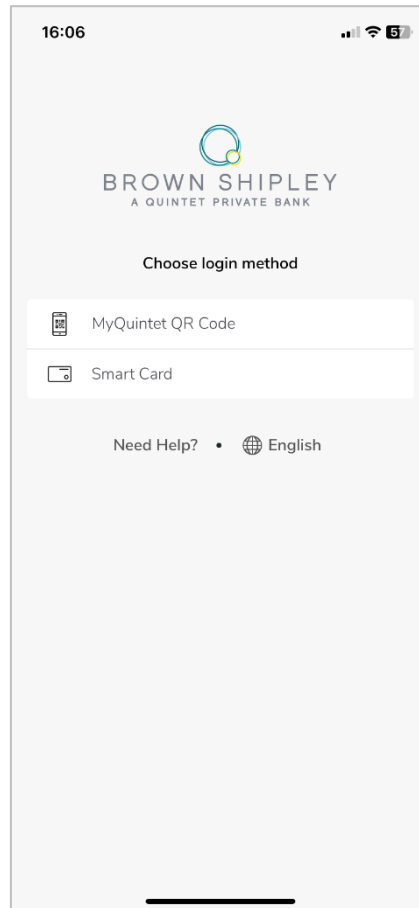
Fingerprint or face ID authentication can be activated/deactivated at any time via your App settings when you're logged in.

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

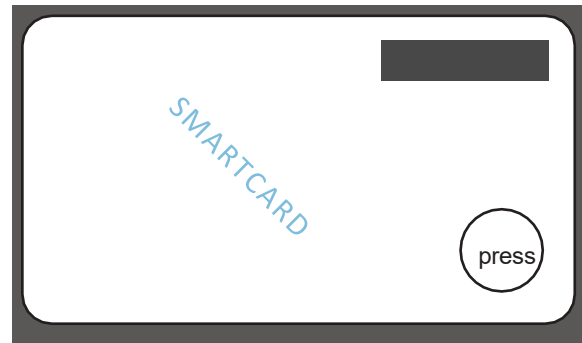


# HOW TO LOGIN

You can access My Brown Shipley on your mobile device via a Smartcard or QR Code. Go through the following slides to find out how to log-in using either options.



# LOGIN VIA A SMARTCARD



# HOW TO LOGIN- USING A SMARTCARD

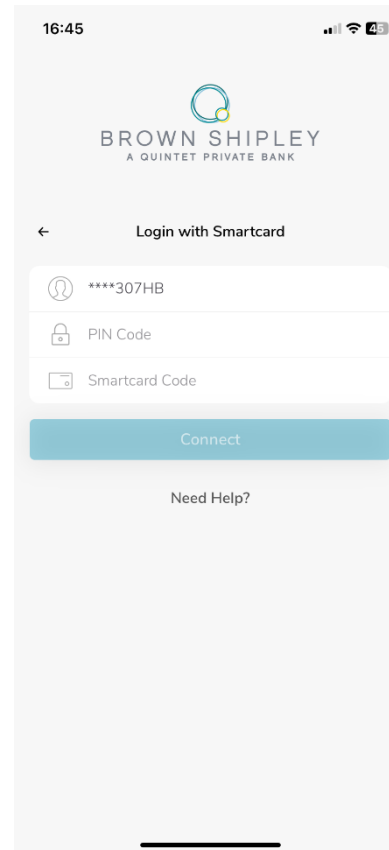
To access My Brown Shipley on your mobile device using a Smartcard you will need:

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.



Enter the following information:

- 1 Username
- 2 PIN Code
- 3 Smartcard Code



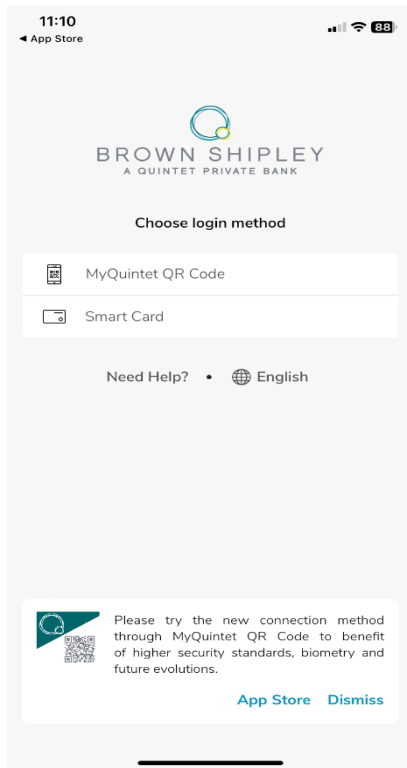
**YOUR SMARTCARD CODE:** Press the button in the bottom right corner of your Smartcard to generate a six-digit code. Enter all six digits in the Smartcard code field. Please note, the code is only valid for 15 seconds after which a new code will need to be generated.

# LOGIN VIA A QR CODE

# HOW TO LOGIN – USING A QR CODE

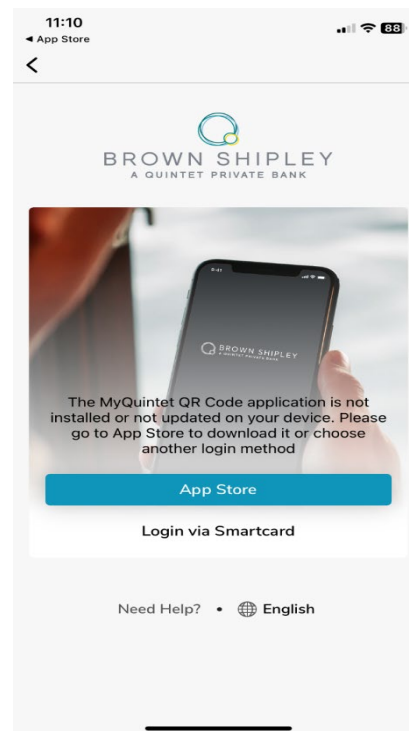
To access My Brown Shipley using a QR code you first need to, download the MyQuintet QR Code App on you mobile or tablet device. The following steps, walk you through the screens when you first choose the MyQuintet QR Code login option.

1. Select 'MyQuintet QR Code' option from landing page.

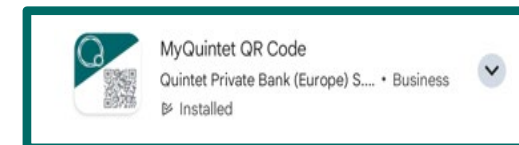
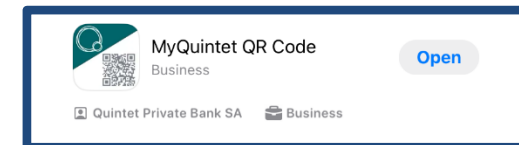


2. You will then have two option

- App Store
- Login via Smartcard choose 'App Store'



3. Once you've selected 'App Store' you'll will need to download **MyQuintet QR Code App**

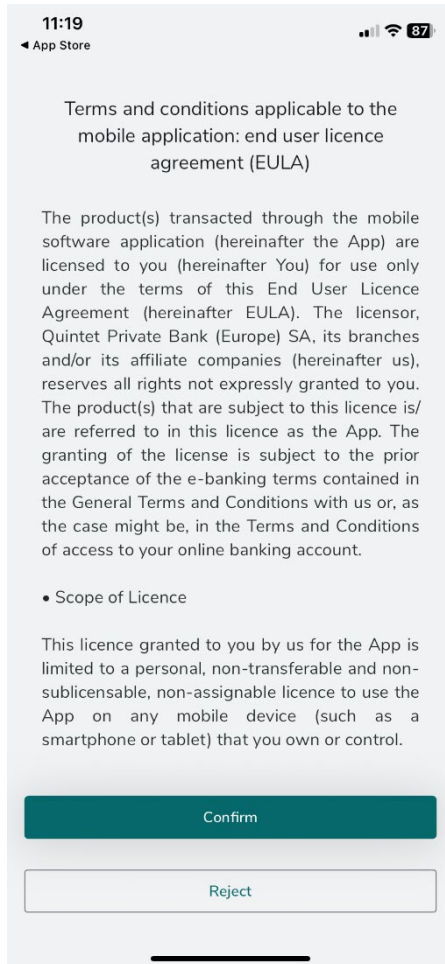


## Why use My Quintet QR Code?

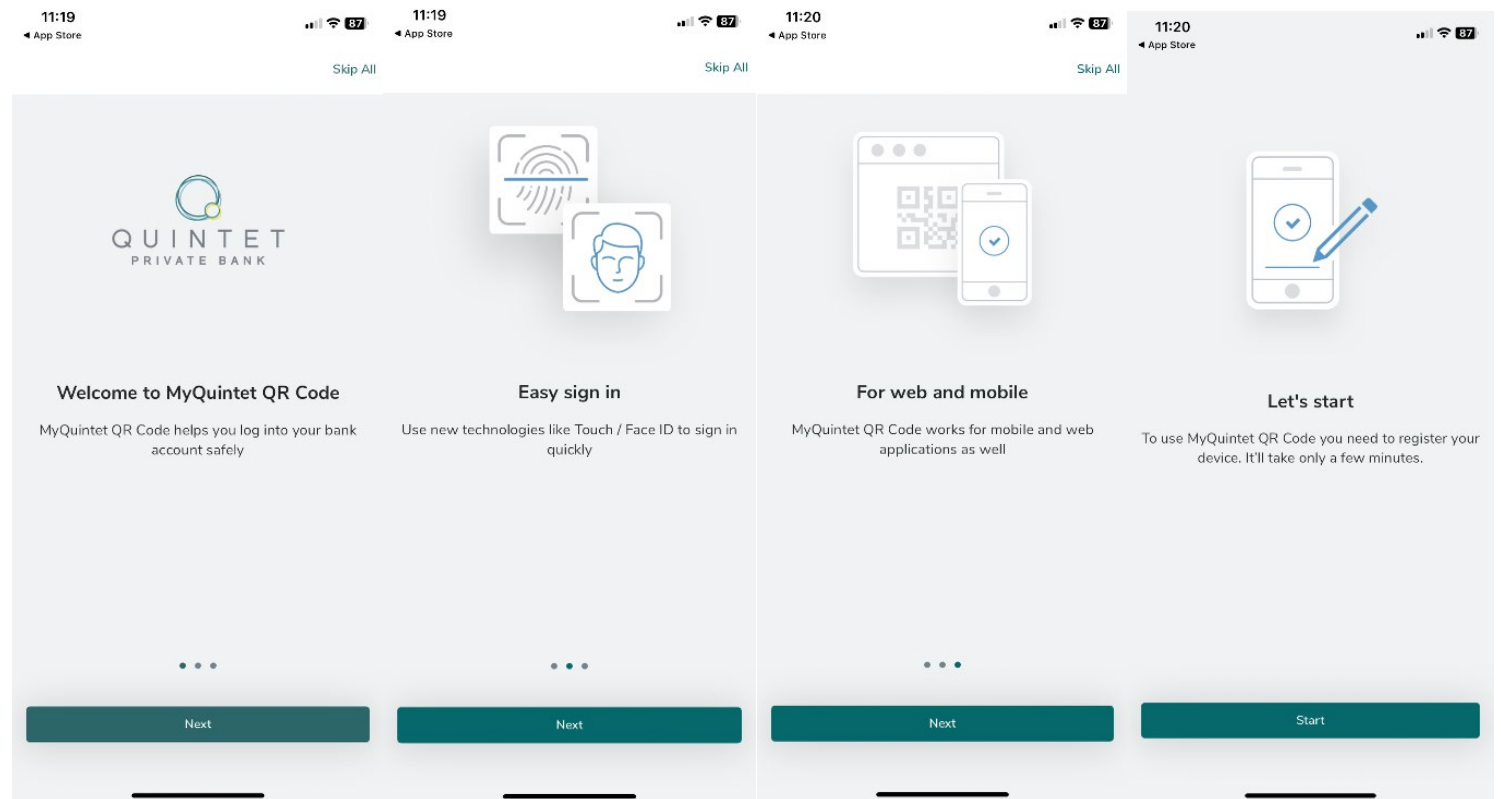
My Quintet QR Code makes it quicker and easier to login to My Brown Shipley on your desktop. Once you have completed the initial registration for My Quintet QR Code you can use the App to login to My Brown Shipley from anywhere without the need to have your Smartcard to hand. It also acts as a back up if you lose your Smartcard meaning you can still login to My Brown Shipley to view your portfolios.

# HOW TO LOGIN – USING A QR CODE

4. You will need to confirm the terms and conditions and move through the welcome slides.



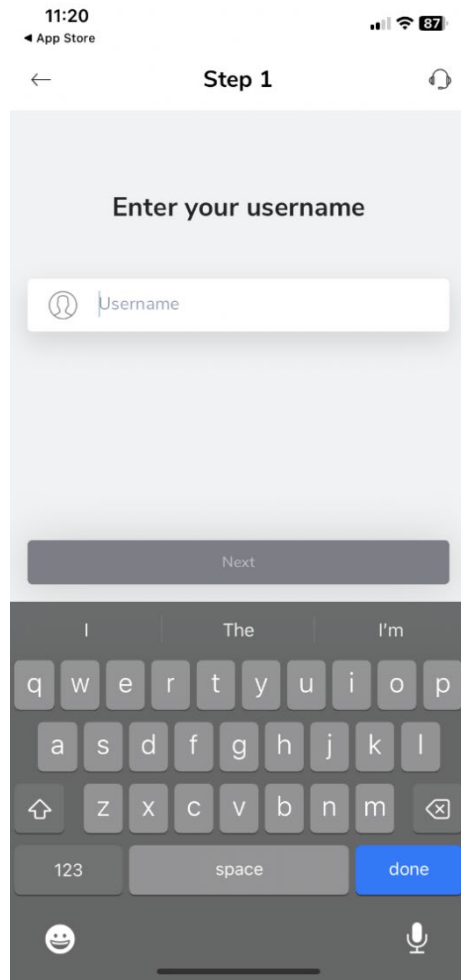
## Welcome slides



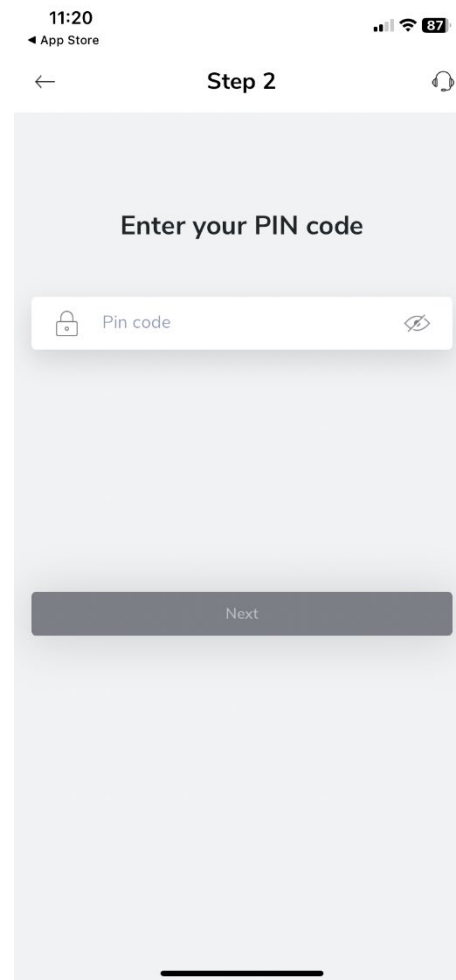
# HOW TO LOGIN – USING A QR CODE

5. You will then need to enter you

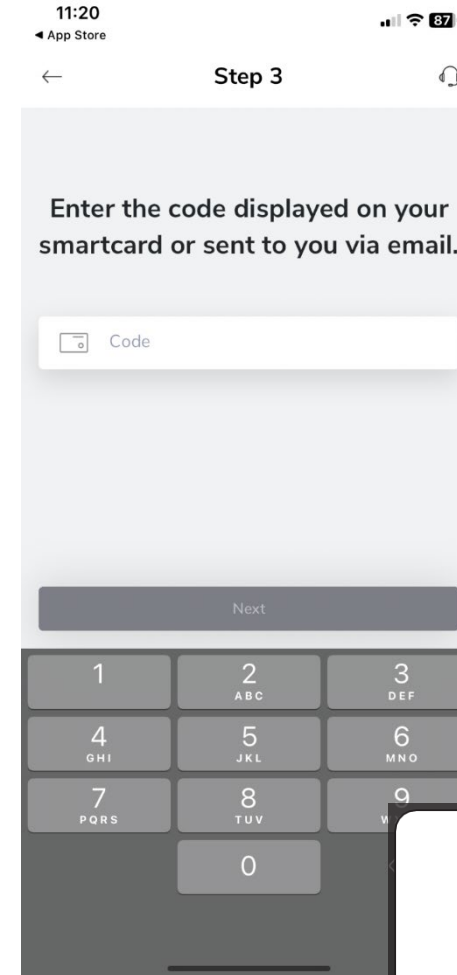
- Username (usually begins with KB)



6. Then need to enter their 6-8 digit PIN

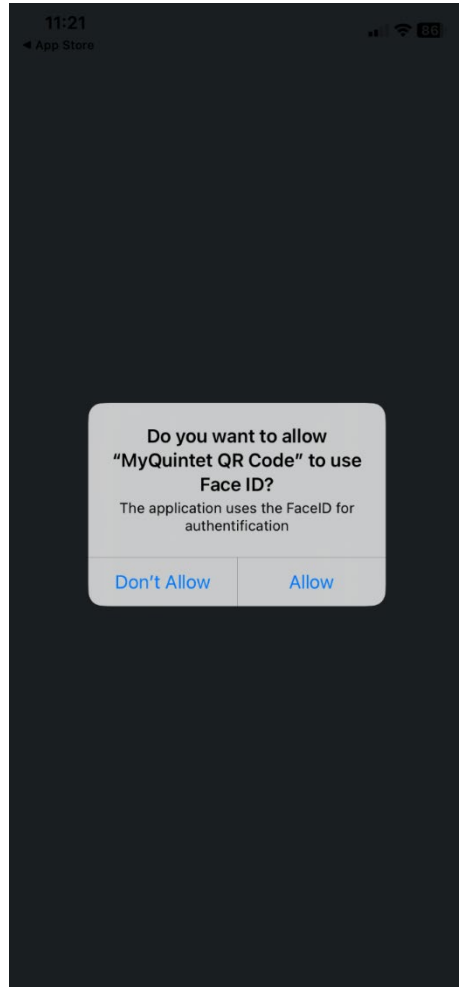


7. You will then need to use your Smart card to enter your 6 digital code which is displayed on the Smartcard.

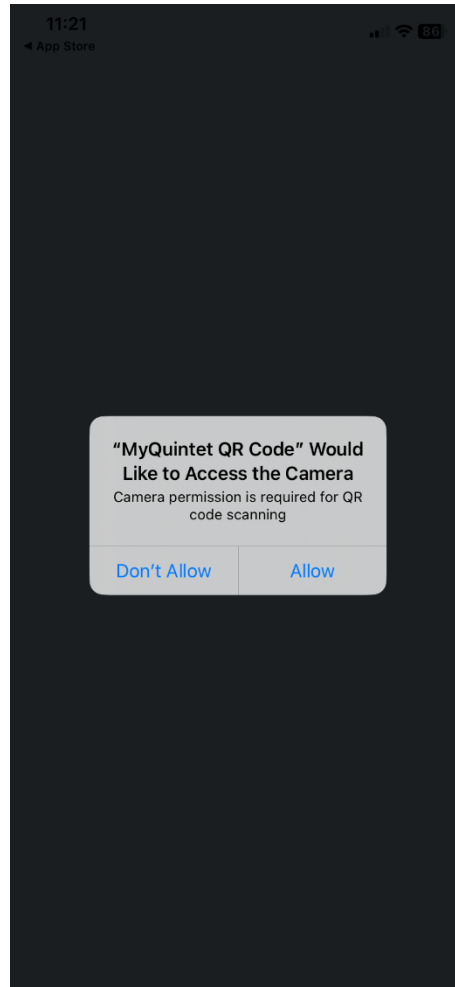


# HOW TO LOGIN – USING A QR CODE

8. Select 'OK' to allow 'MyQintet QR Code' App to access their Face ID

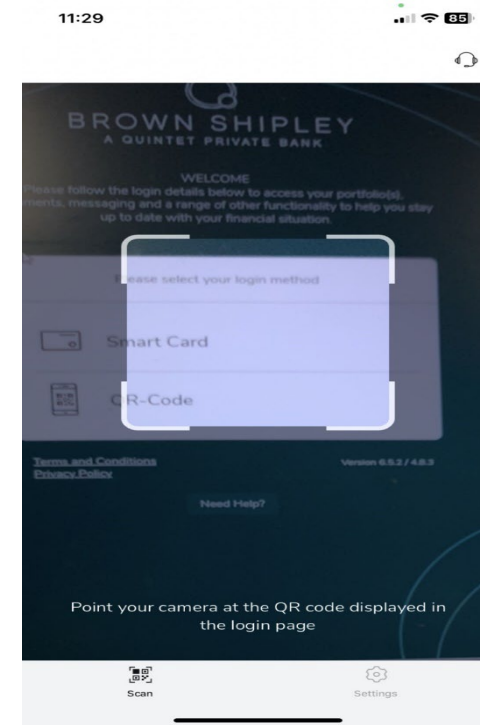


9. 'OK' to allow 'MyQintet QR Code' App to access your camera



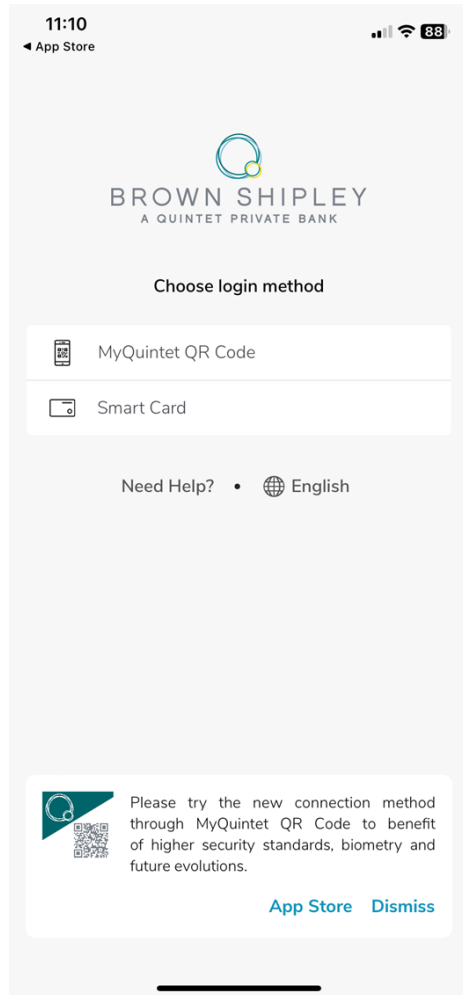
10. You have now successfully installed the MyQintet QR Code App and will see the below on your mobile / tablet device.

**PLEASE NOW CLOSE THE MYQINTET QR CODE APP AND FOLLOW THE INSTRUCTIONS ON THE FOLLOWING SLIDES.**

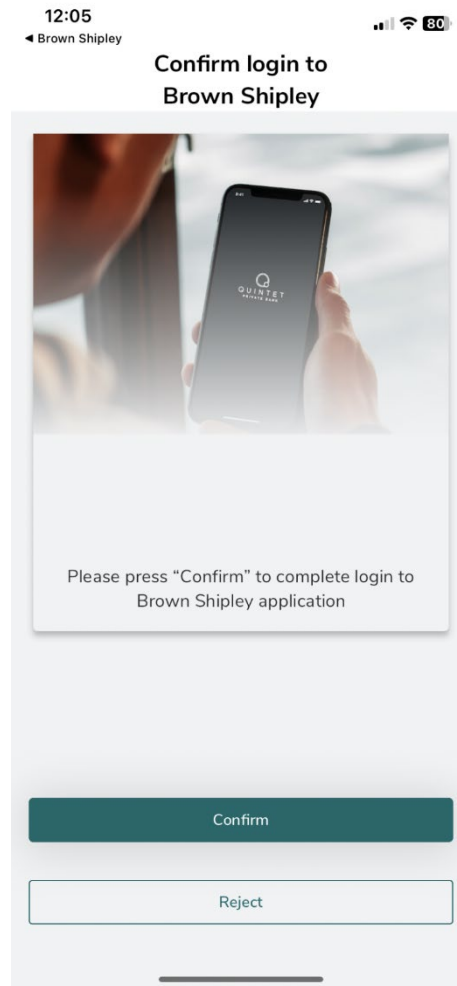


# HOW TO LOGIN – USING A QR CODE

11. You will need to come out of the MyQuintet QR Code App and go into the **MyBrownShipley App**. Once in the App click select login via the MyQuintet QR Code.



12. Select 'confirm' to complete login to My Brown Shipley. By doing this you will now be directed automatically to the MyBrown Shipley App.



Step 12. This needs to be completed each time the client selects login via the MyQuintet QR Code option but will allow access without the need to input their credentials.

# HOW TO LOGIN – USING A QR CODE

13. Once back in the MyBrownShIPLEY App you will be prompted to navigate through the welcome slides below. These will only show on your first login.

**Login with MyQintet QR Code**  
We are glad to present a new login method with MyQintet QR Code application

**Quick and easy**  
Use new technologies like Touch / Face ID to sign in quickly and securely.

**Quick access to everything you need.**  
Bottom bar allows you to access all menus with a single click.

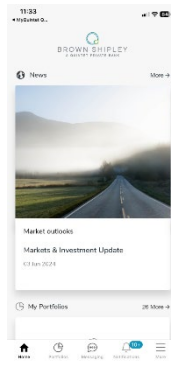
**Easy access to notifications.**  
A counter close to bell icon is notifying you about unread notifications, click on it to access details.

**Easy navigation with cards.**  
All the key information in the form of colorful cards you can swipe with your fingertips.

**Our latest insights news.**  
Find the latest articles published online by Brown Shipley, our publications and investment analysis.

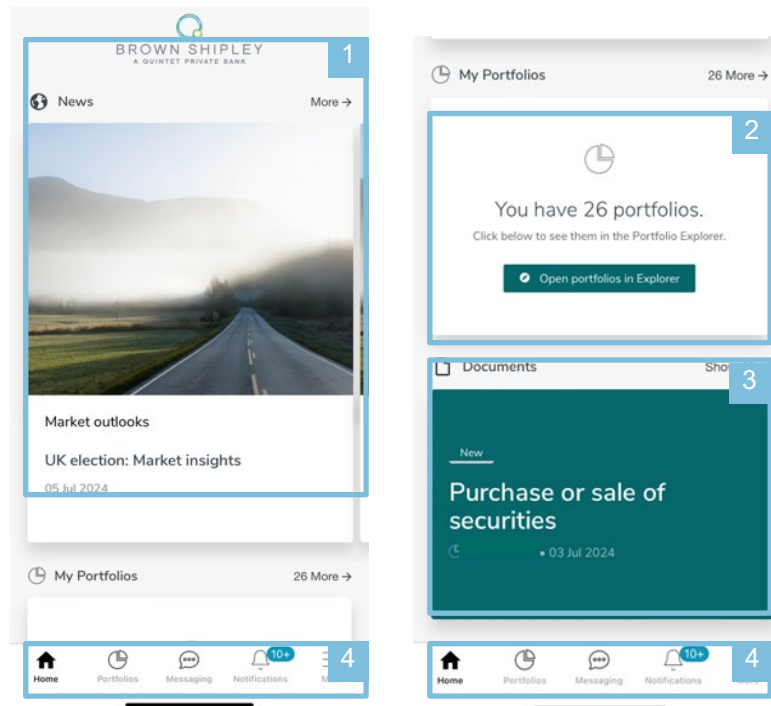
**View all your portfolios at a glance.**  
Quickly monitor performance of your portfolios and navigate to detailed views with one click.

You have now have successfully logged in.



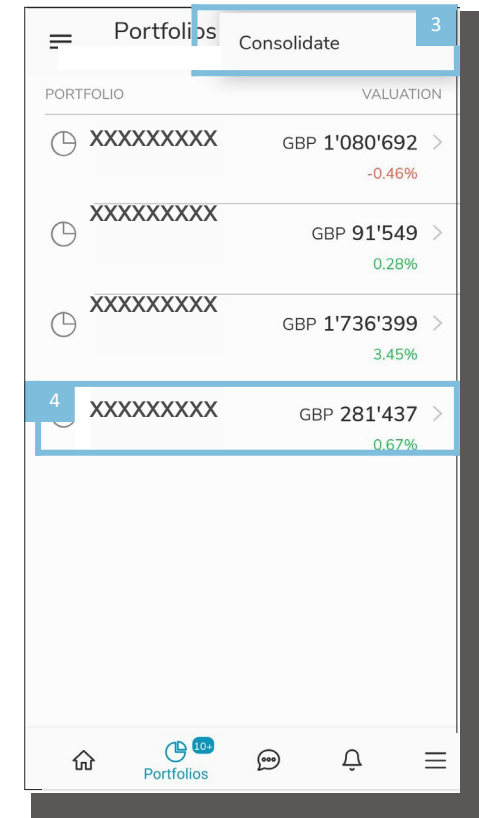
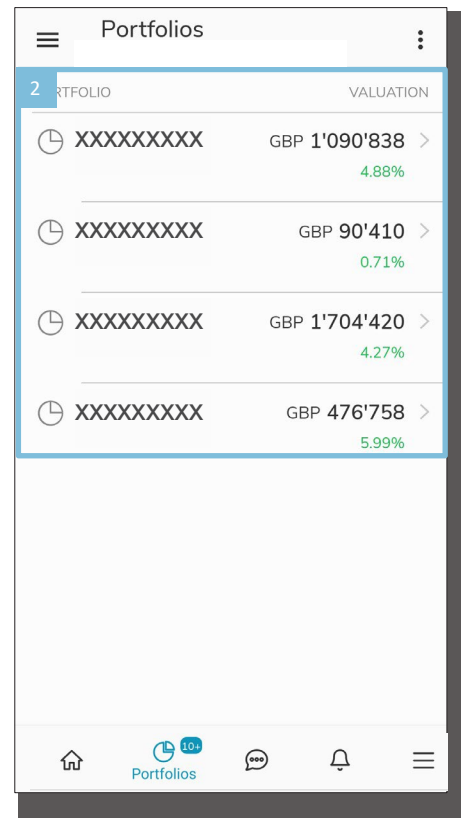
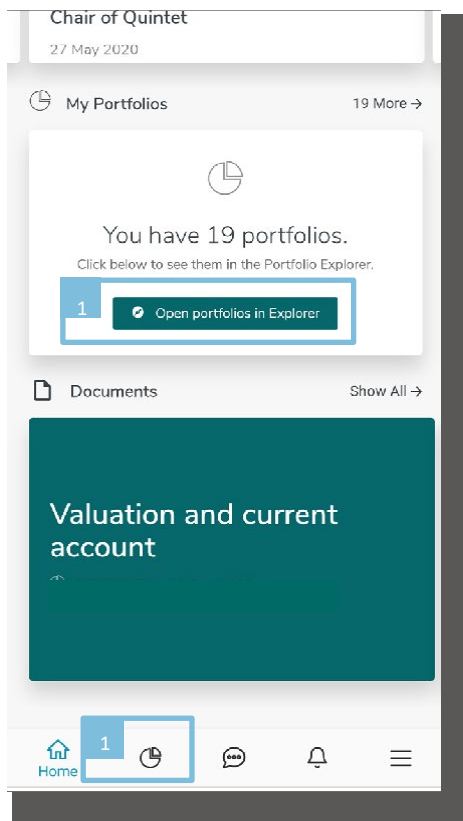
# Homescreen

- 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.



# VIE W 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

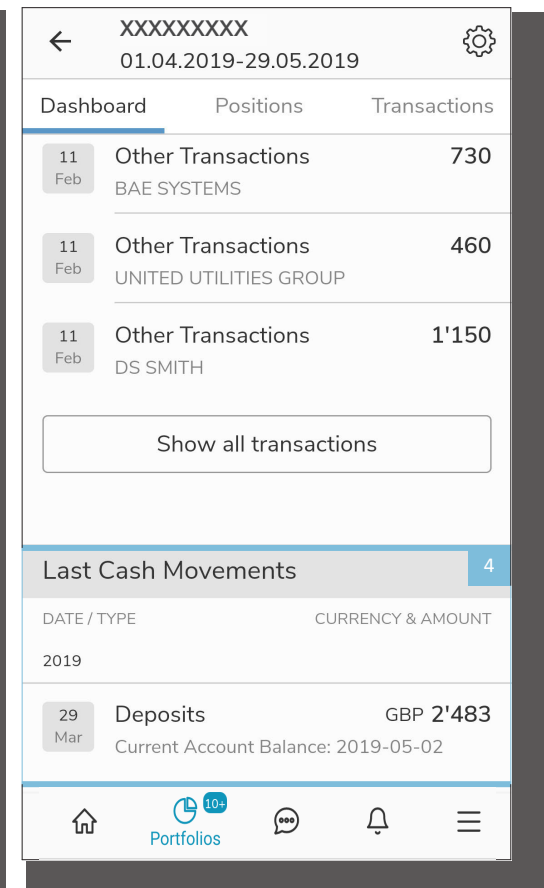
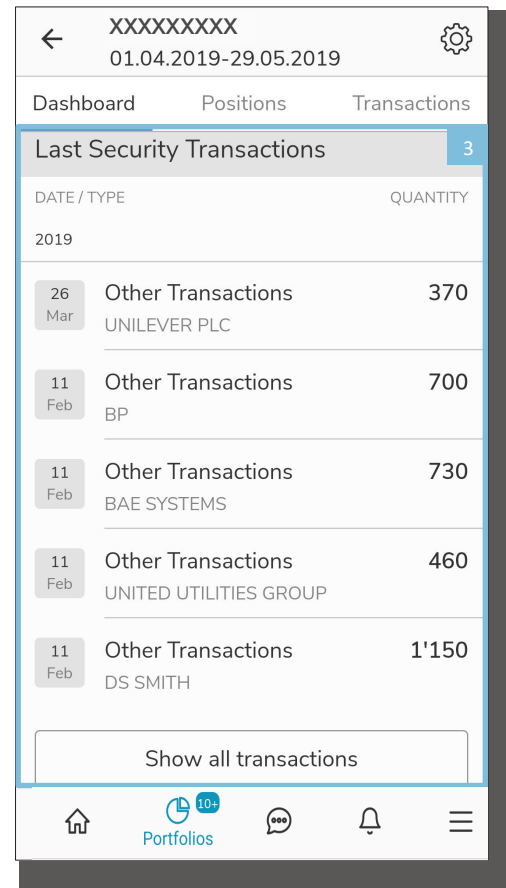
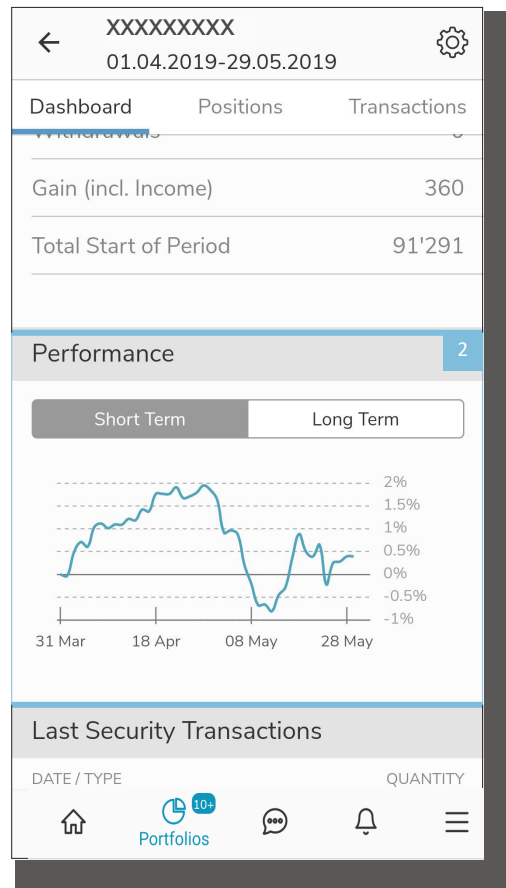
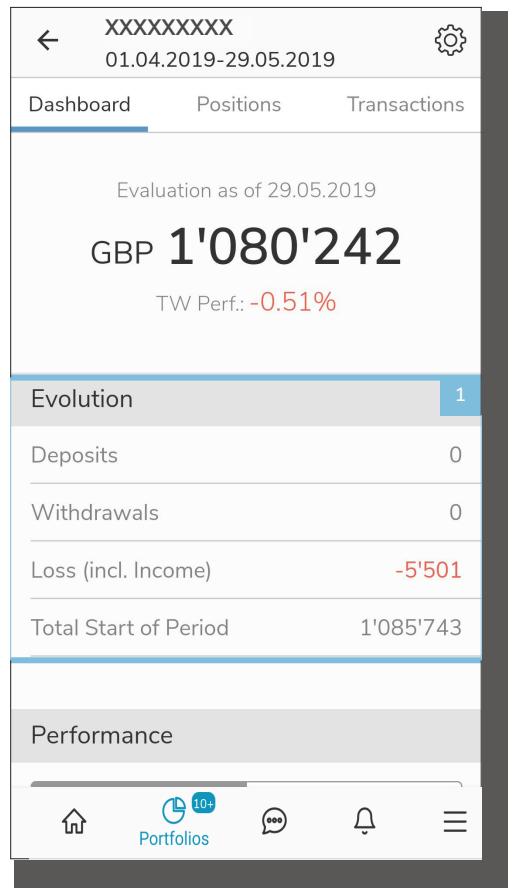
The dashboard displays:

1 Portfolio Evolution

2 Portfolio Performance

3 Latest Security Transactions

4 Last Cash Movements

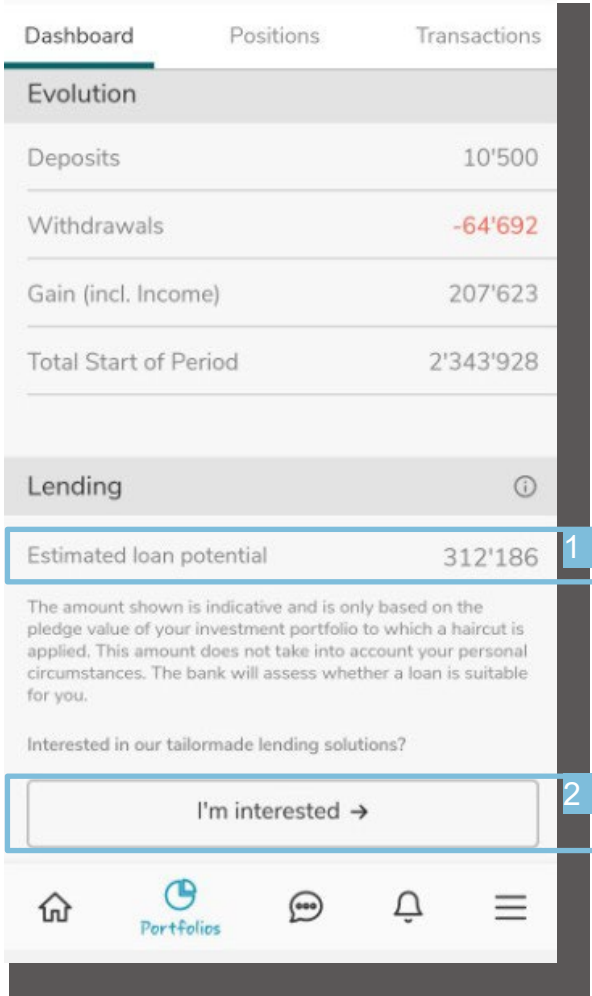


# LOAN - TO - VALUE

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

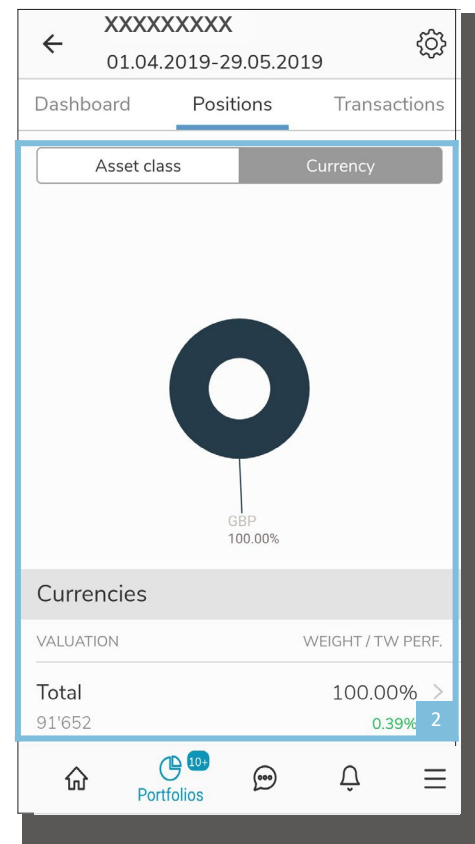
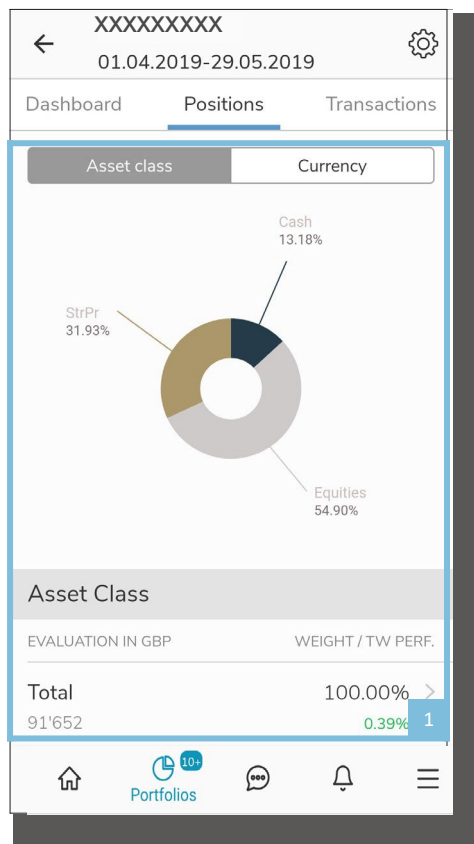


All lending is subject to qualifying criteria

# 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.

XXXXXXX  
01.02.2019-23.04.2019

Dashboard Positions **Transactions** 1

Last Security Transactions 2

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

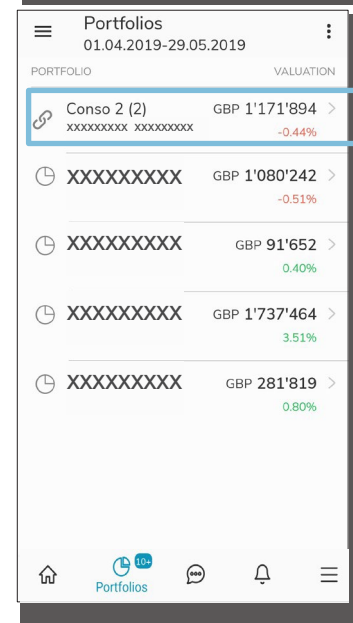
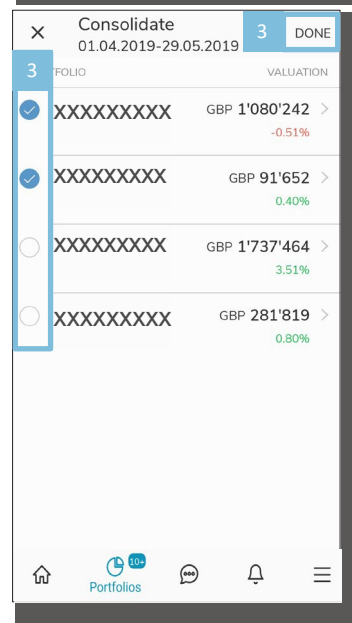
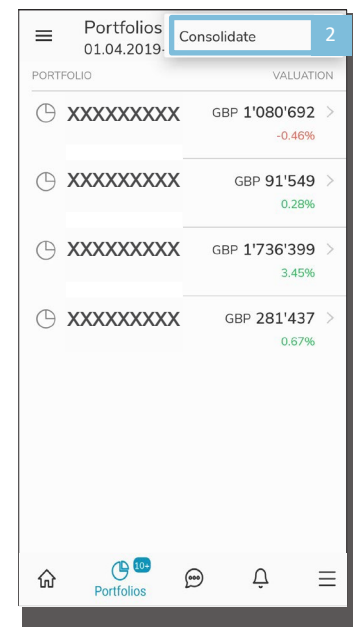
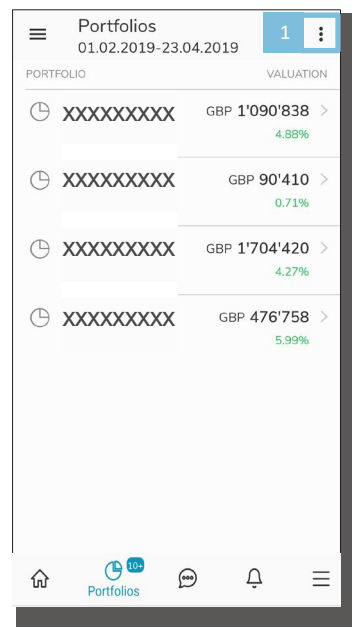
Show all transactions

Portfolios

# 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.

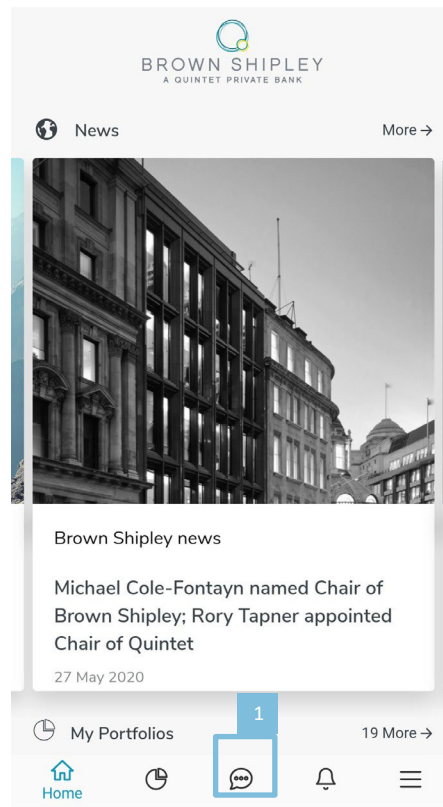


# SECURE MESSAGING

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

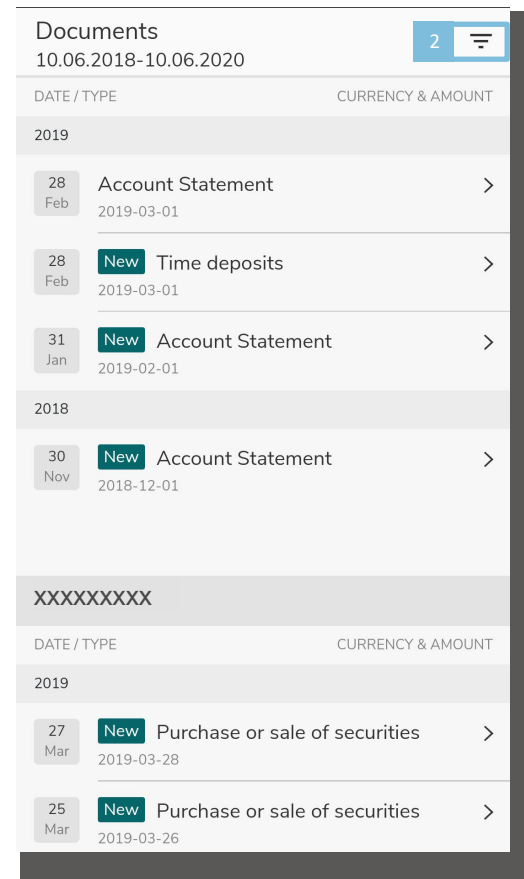
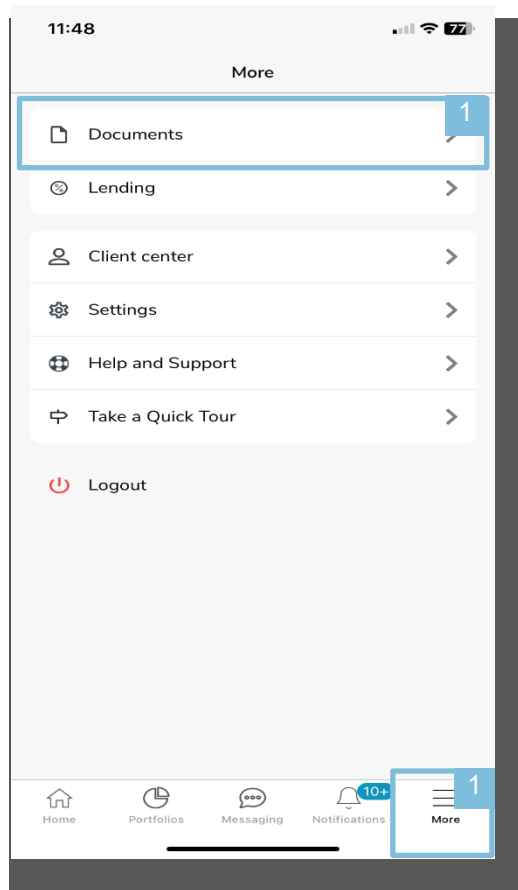
If you have chosen to go paperless you can access documents applicable to your linked portfolios - including valuations, account statements and purchase or sale notifications by clicking on more and then the 'Documents' icon from the navigation screen.

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.

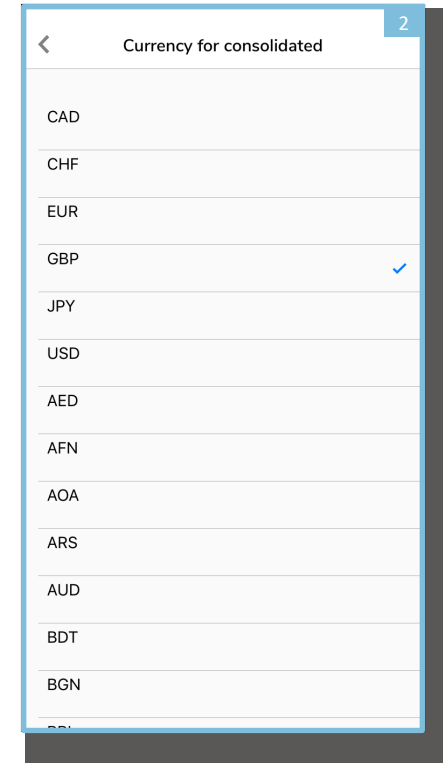
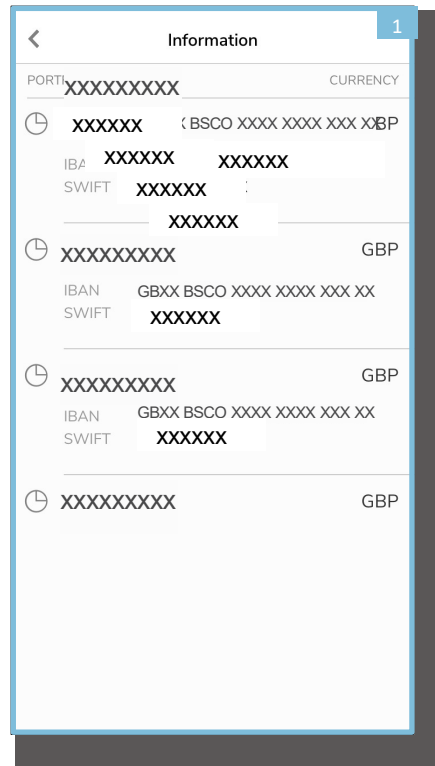
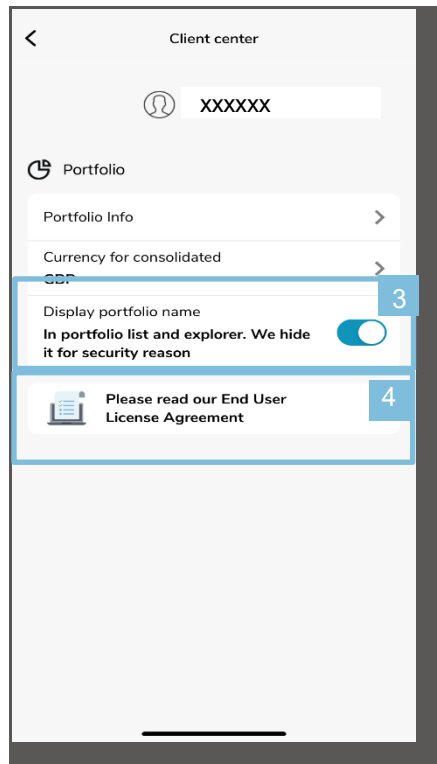


# CLIENT CENTER

This area enables you to view and amend the following:

## Portfolios

- 1 Portfolio information – Shows the IBAN and SWIFT code for each portfolio
- 2 Currency Consolidation – Allows you to amend your currency preference
- 3 Display Portfolio name – Allows you to hide the portfolio name for security purposes
- 4 Please read our End User Licence Agreement – Displays our full licence agreement

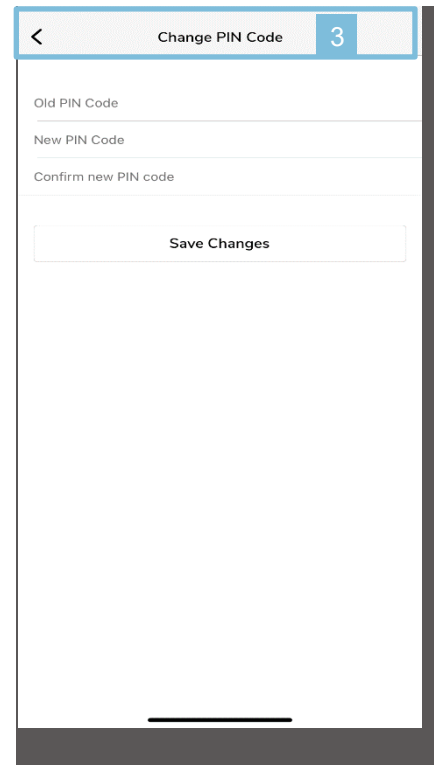
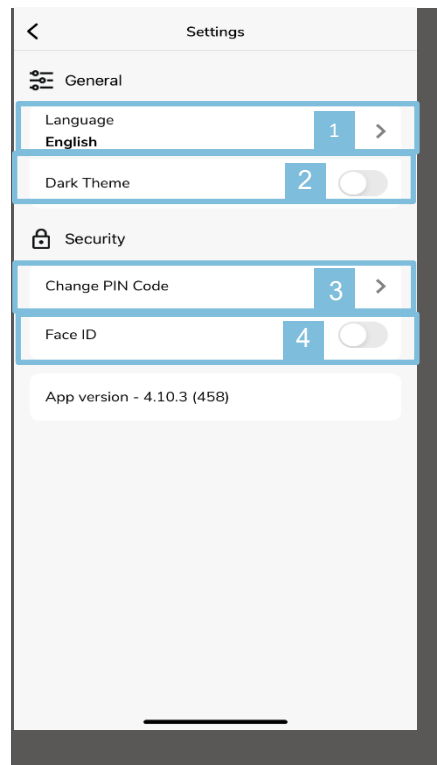


# CLIENT CENTER

This area enables you to view and amend the following:

## Settings

- 1 Language – shows the default language set
- 2 Dark Theme – Allows you to change the colour of the background
- 3 Change PIN – Allows you to change your smartcard PIN (if logged in via a smartcard)
- 4 Face/Touch ID – Allows you to set up face/touch ID for quicker login

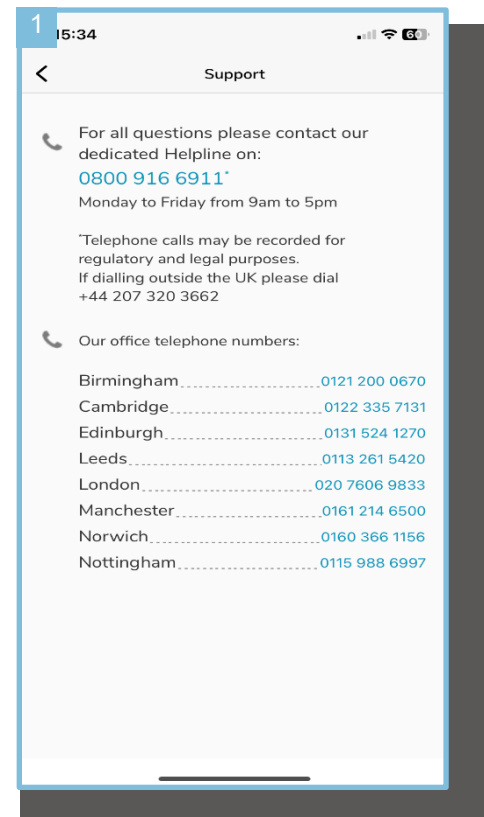
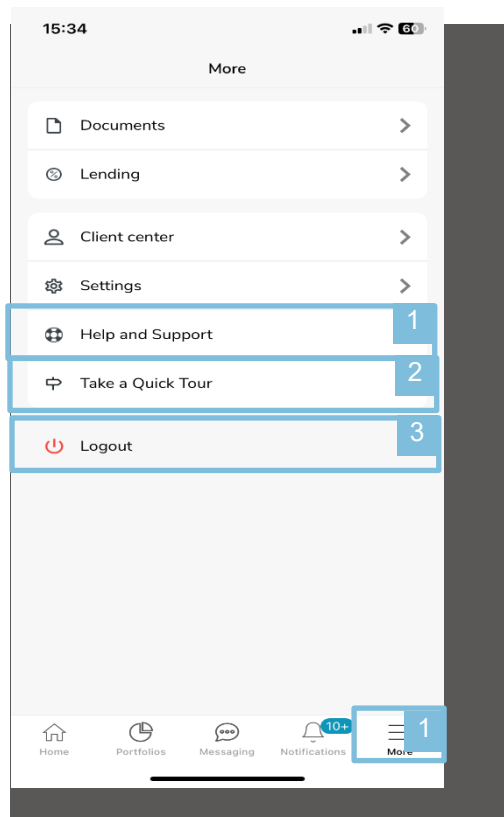


# SUPPORT AND LOGOUT

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 5 minutes inactivity.
- 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](mailto:mbs.support@brownshipley.co.uk)

For further information on My Brown Shipley, 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 2024

[MYBS M11.24]