

The following sections provide a step-by-step guide on how to register in our portal to view your statement of account (SOA) at your convenience.

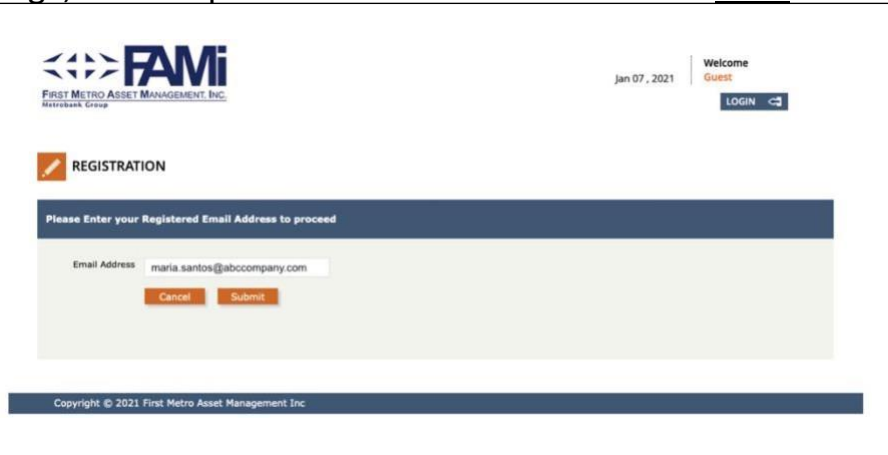
## ***Registration and Enrollment for FAMI Portal Access (first-time users)***

### **STEP 1**

In the REGISTRATION page, click Corporate Account. Then click NEXT. **STEP**

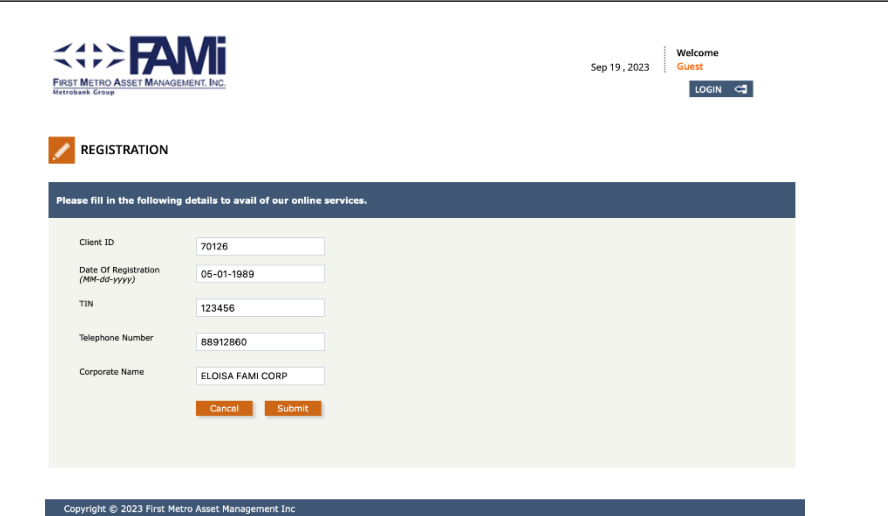
### **2**

Enter your registered email address to proceed.



The screenshot shows the FAMI portal registration page. At the top left is the FAMI logo. At the top right, it says "Welcome Guest" with the date "Jan 07, 2021" and a "LOGIN" button. Below the logo is a "REGISTRATION" header with a pencil icon. A dark blue bar contains the text "Please Enter your Registered Email Address to proceed". Below this is an "Email Address" input field containing "maria.santos@abccompany.com". There are "Cancel" and "Submit" buttons below the input field. At the bottom, a copyright notice reads "Copyright © 2021 First Metro Asset Management Inc."

**STEP 3** Provide your information as shown below, then click SUBMIT.

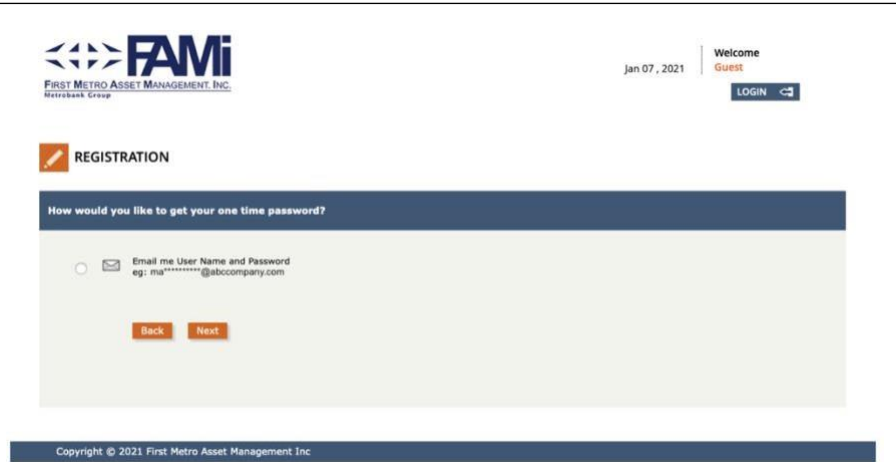


The screenshot shows the FAMI portal registration page with the detailed information form. At the top left is the FAMI logo. At the top right, it says "Welcome Guest" with the date "Sep 19, 2023" and a "LOGIN" button. Below the logo is a "REGISTRATION" header with a pencil icon. A dark blue bar contains the text "Please fill in the following details to avail of our online services.". Below this are several input fields: "Client ID" (70126), "Date Of Registration (MM-dd-yyyy)" (06-01-1989), "TIN" (123456), "Telephone Number" (88912860), and "Corporate Name" (ELOISA FAMI CORP). There are "Cancel" and "Submit" buttons below the input fields. At the bottom, a copyright notice reads "Copyright © 2023 First Metro Asset Management Inc."

*A pop-up message will appear "Are you sure you want to submit data?", click OK.*

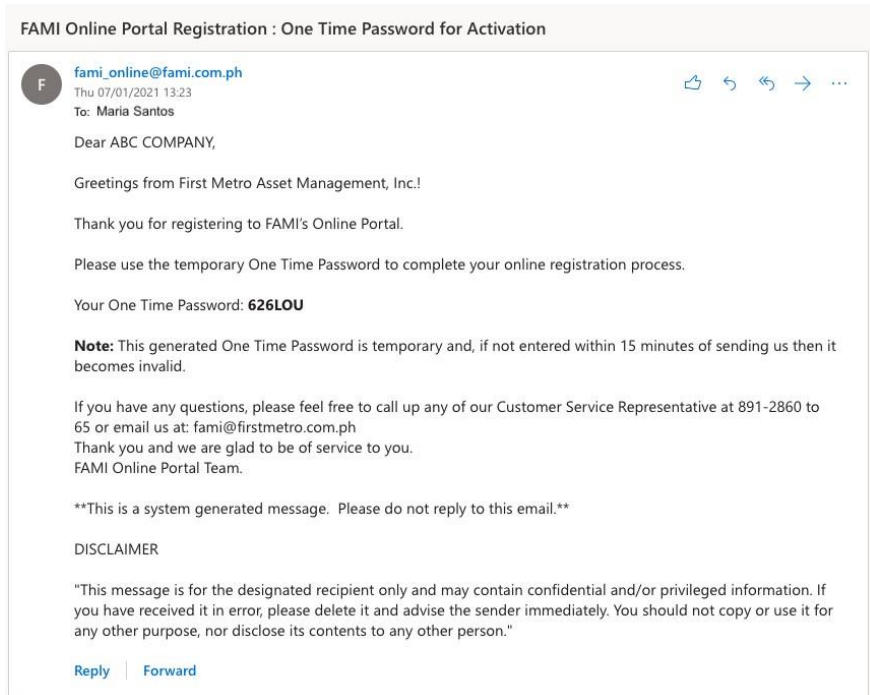
#### Step 4

Choose to receive your one-time password (OTP) via email, then click NEXT.

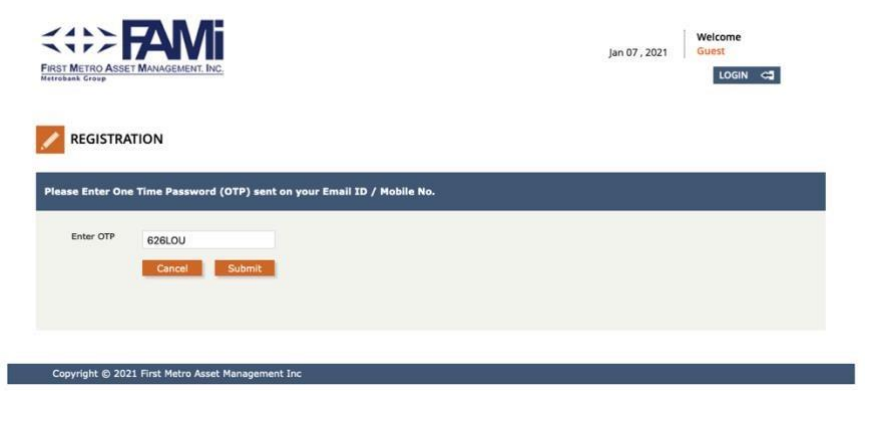


*A pop-up message will appear "Are you sure you want to generate OTP?", click OK.*

The OTP shall be sent immediately to your email address. Below is an example of what you will receive:

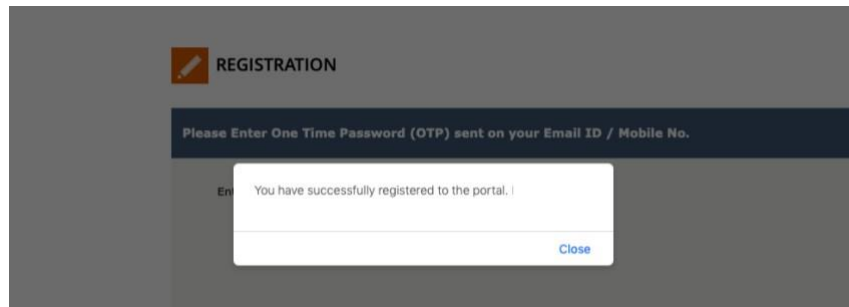


**STEP 5** Enter the OTP in the appropriate field as shown below, then click SUBMIT.

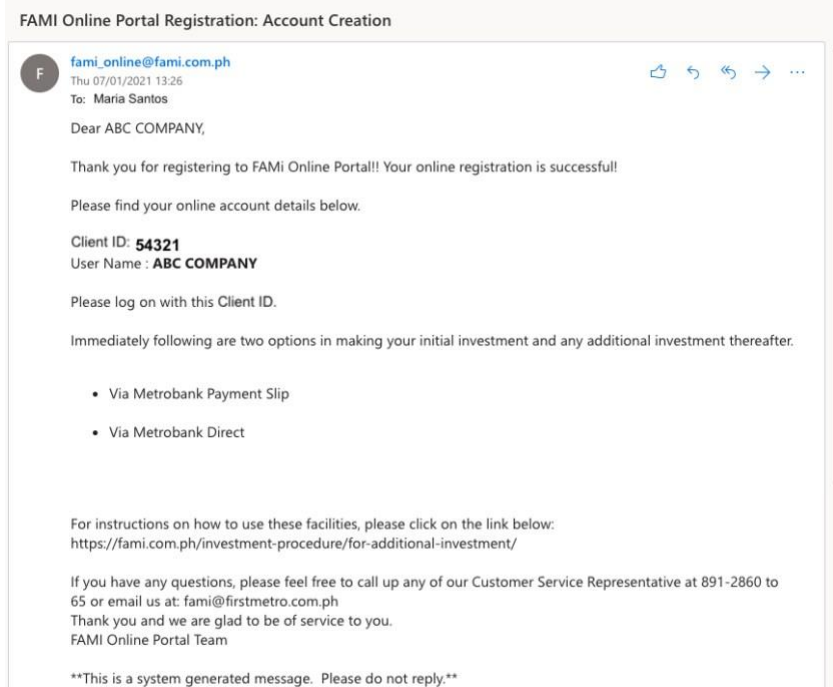


**STEP 6** Once successful, you will be prompted by this message:

A pop-up message will appear "You have successfully registered to the portal" will appear. Click "Close".



You will also receive an email confirming your successful registration with your CLIENT ID.



**NOTE:** Your CLIENT ID is different from your FAMI Account Number and shall only be used in the FAMI Portal.

You will also be prompted to immediately change your password as shown below:



Jan 07, 2021

Welcome  
Guest

LOGIN

 REGISTRATION

Change Password

- Password must have at least 1 special character.
- Password must not contain your user id.
- Password must be alphanumeric.
- Password must not match with your 5 old passwords .
- Password should be greater than 7 characters and less than 14 characters.

New Password

Confirm New Password

Cancel

Submit

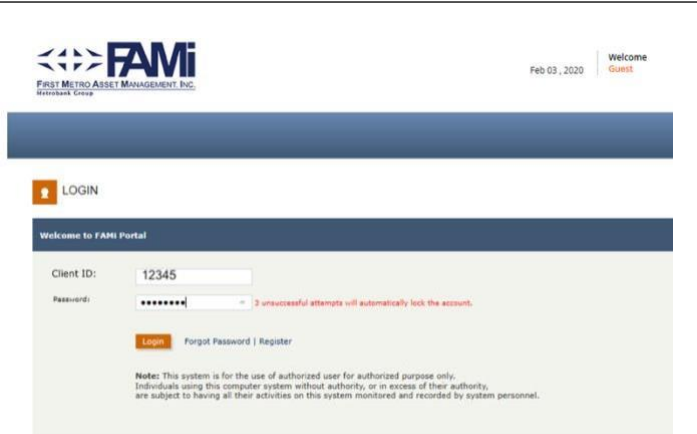
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## How to View Your Latest Investment Summary

Now that you have successfully registered to the FAMI Portal, this guide will show you how to log-in and view your latest Investment Summary.

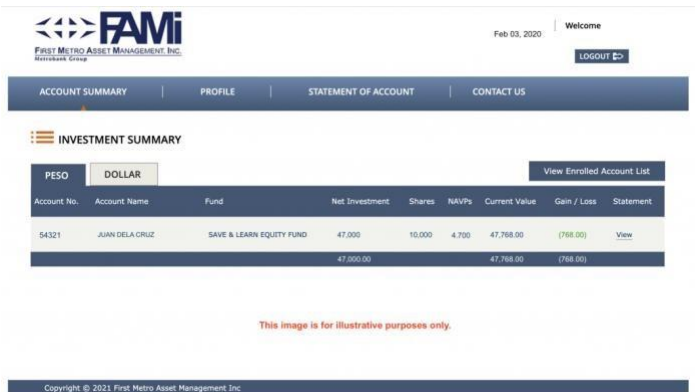
### STEP 1

Login to the FAMI Portal by entering your Client ID and password, then Click the LOGIN button.



### STEP 2

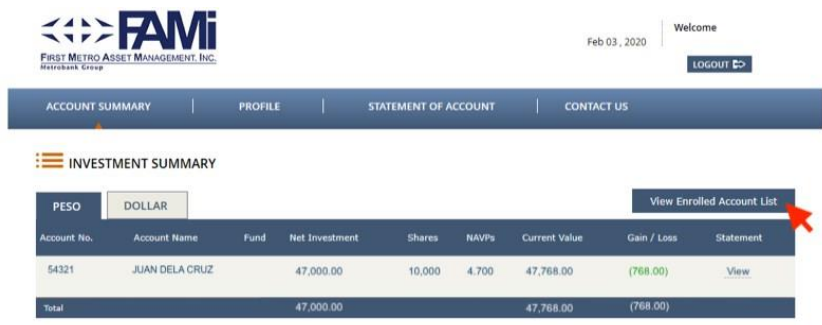

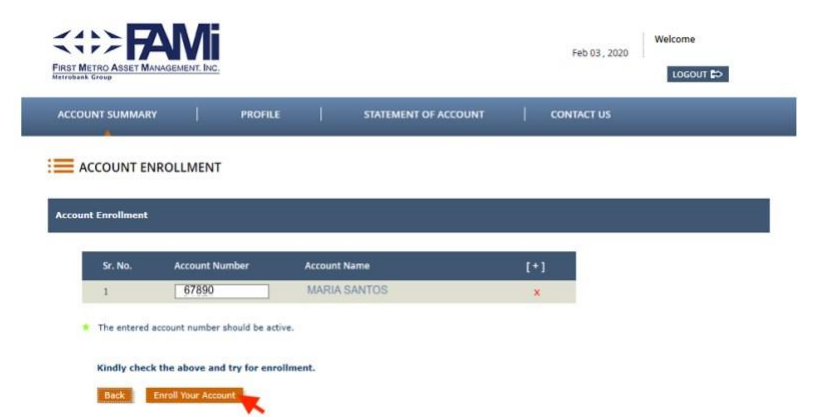
Upon successful login, you will be redirected to the Investment Summary Page. Primary account is immediately enrolled to the FAMI Portal. If you have other accounts, please proceed to **HOW TO ENROLL MULTIPLE ACCOUNTS**.



Account No.	Account Name	Fund	Net Investment	Shares	NAVPs	Current Value	Gain / Loss	Statement
54321	JUAN DELA CRUZ	SAVE & LEARN EQUITY FUND	47,000.00	10,000	4.700	47,768.00	(768.00)	<a href="#">View</a>
			47,000.00			47,768.00	(768.00)	

## How to Enroll Multiple Accounts

If you have additional FAMI Account Numbers, you may do the enrollment process below:

<p><b>STEP 1</b></p> <p>Under the Account Summary Tab, click <b>VIEW ENROLLED ACCOUNT LIST</b>.</p>	 <p>The screenshot shows the FAMI account summary page. The 'ACCOUNT SUMMARY' tab is selected. Under the 'INVESTMENT SUMMARY' section, the 'View Enrolled Account List' button is highlighted with a red arrow.</p> <table border="1"> <thead> <tr> <th>Account No.</th> <th>Account Name</th> <th>Fund</th> <th>Net Investment</th> <th>Shares</th> <th>NAVPs</th> <th>Current Value</th> <th>Gain / Loss</th> <th>Statement</th> </tr> </thead> <tbody> <tr> <td>54321</td> <td>JUAN DELA CRUZ</td> <td></td> <td>47,000.00</td> <td>10,000</td> <td>4.700</td> <td>47,768.00</td> <td>(768.00)</td> <td>View</td> </tr> <tr> <td colspan="3">Total</td> <td>47,000.00</td> <td></td> <td></td> <td>47,768.00</td> <td>(768.00)</td> <td></td> </tr> </tbody> </table>	Account No.	Account Name	Fund	Net Investment	Shares	NAVPs	Current Value	Gain / Loss	Statement	54321	JUAN DELA CRUZ		47,000.00	10,000	4.700	47,768.00	(768.00)	View	Total			47,000.00			47,768.00	(768.00)	
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<p><b>STEP 2</b></p> <p>Click <b>ENROLL ADDITIONAL ACCOUNT</b>.</p>	 <p>The screenshot shows the FAMI 'ENROLLED ACCOUNT' page. The 'Enroll Additional Account' button is highlighted with a red arrow.</p> <table border="1"> <thead> <tr> <th>Account No.</th> <th>Account Name</th> <th>Enrollment Date</th> <th>Type</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>54321</td> <td>JUAN DELA CRUZ</td> <td>January 3, 2020</td> <td>RETAIL</td> <td>A</td> <td>Un-Enroll</td> </tr> </tbody> </table>	Account No.	Account Name	Enrollment Date	Type	Status	Action	54321	JUAN DELA CRUZ	January 3, 2020	RETAIL	A	Un-Enroll															
Account No.	Account Name	Enrollment Date	Type	Status	Action																							
54321	JUAN DELA CRUZ	January 3, 2020	RETAIL	A	Un-Enroll																							
<p><b>STEP 3</b></p> <p>Enter your additional Account Number, then click <b>ENROLL YOUR ACCOUNT</b>.</p>	 <p>The screenshot shows the FAMI 'ACCOUNT ENROLLMENT' page. The 'Enroll Your Account' button is highlighted with a red arrow.</p> <table border="1"> <thead> <tr> <th>Sr. No.</th> <th>Account Number</th> <th>Account Name</th> <th>[+]</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>67890</td> <td>MARIA SANTOS</td> <td>x</td> </tr> </tbody> </table> <p>The entered account number should be active.</p> <p>Kindly check the above and try for enrollment.</p>	Sr. No.	Account Number	Account Name	[+]	1	67890	MARIA SANTOS	x																			
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