

OCBC RM CHAT

A step-by-step guide on how to connect
with your Relationship Manager
securely on OCBC Digital Banking

The logo consists of a dark brown square with a thin white border. Inside the square, the text "OCBC PREMIER BANKING" is written in white, uppercase, sans-serif font, stacked in three lines.

OCBC
PREMIER
BANKING

Introducing OCBC RM Chat, a new tool to stay connected with your Relationship Manager on OCBC Digital Banking



Interact with your Relationship Manager via instant message, voice or video calls

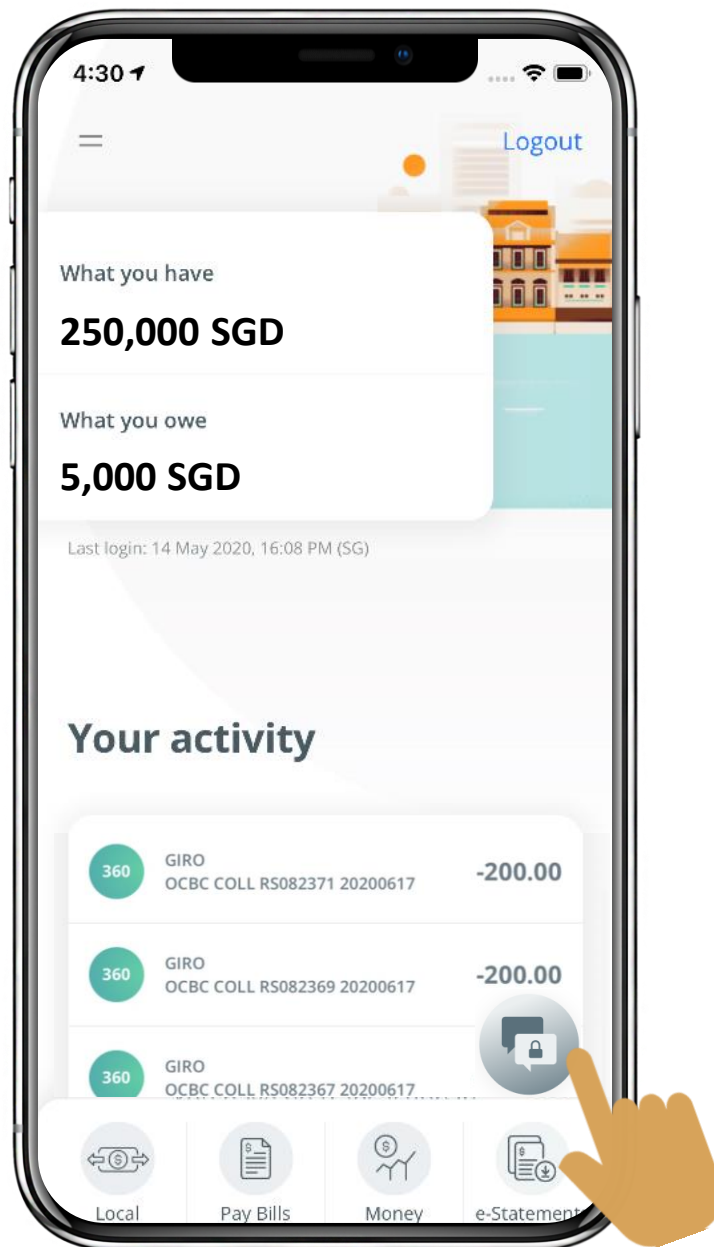


Seize investment opportunities timely with faster trade approval

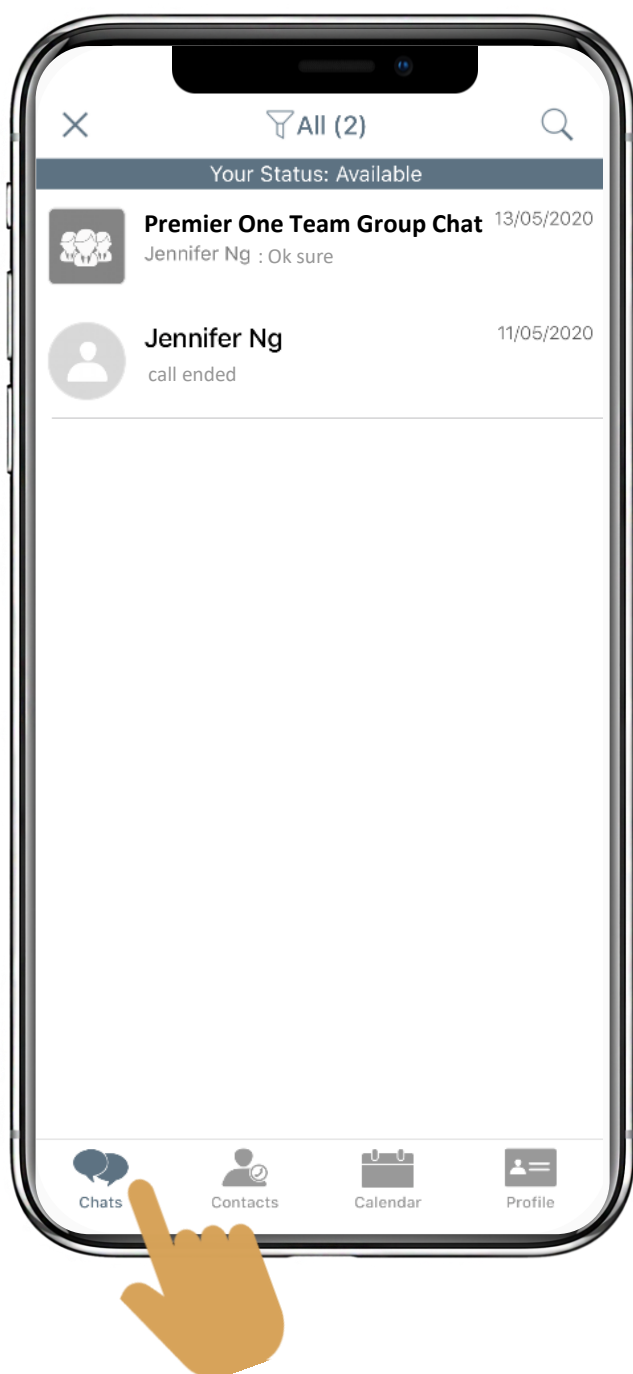


Share documents securely and easily

Log in to OCBC Mobile Banking
and click on the  icon to launch
the new RM Chat service.



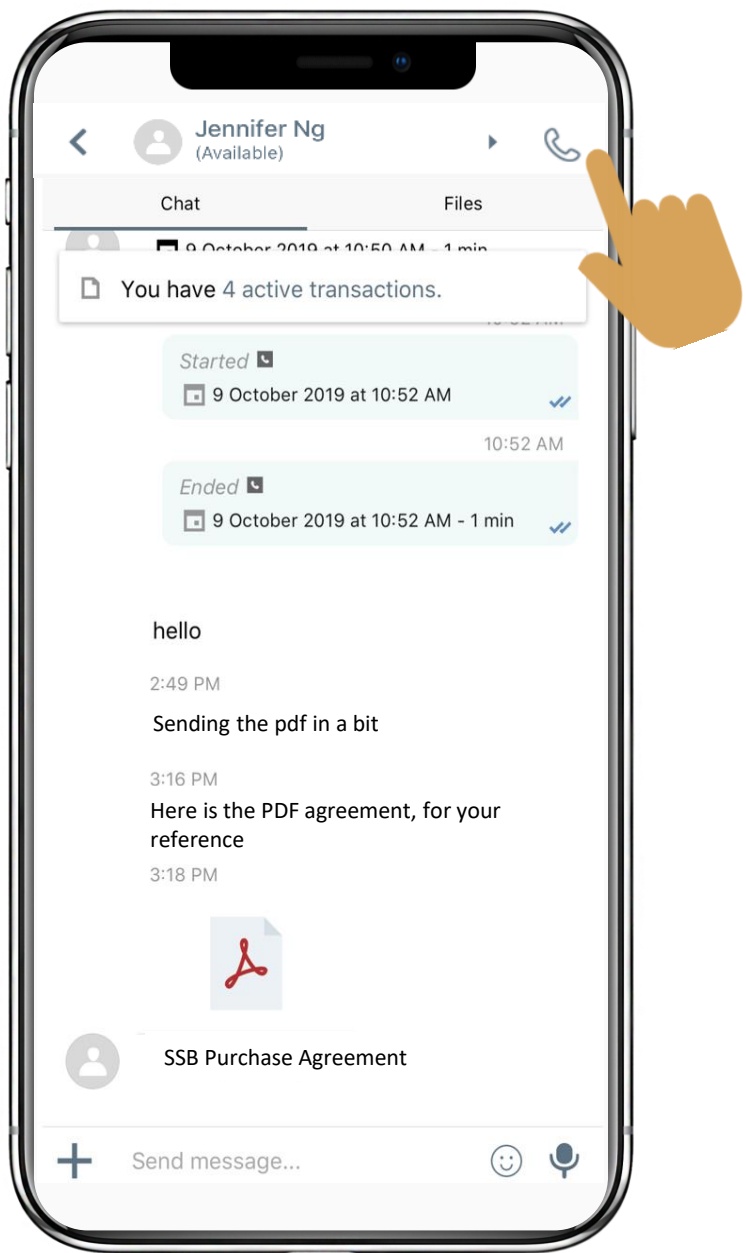
Chat with your Relationship Manager and/or Premier One Team conveniently via instant messages.



You will see 2 chats:

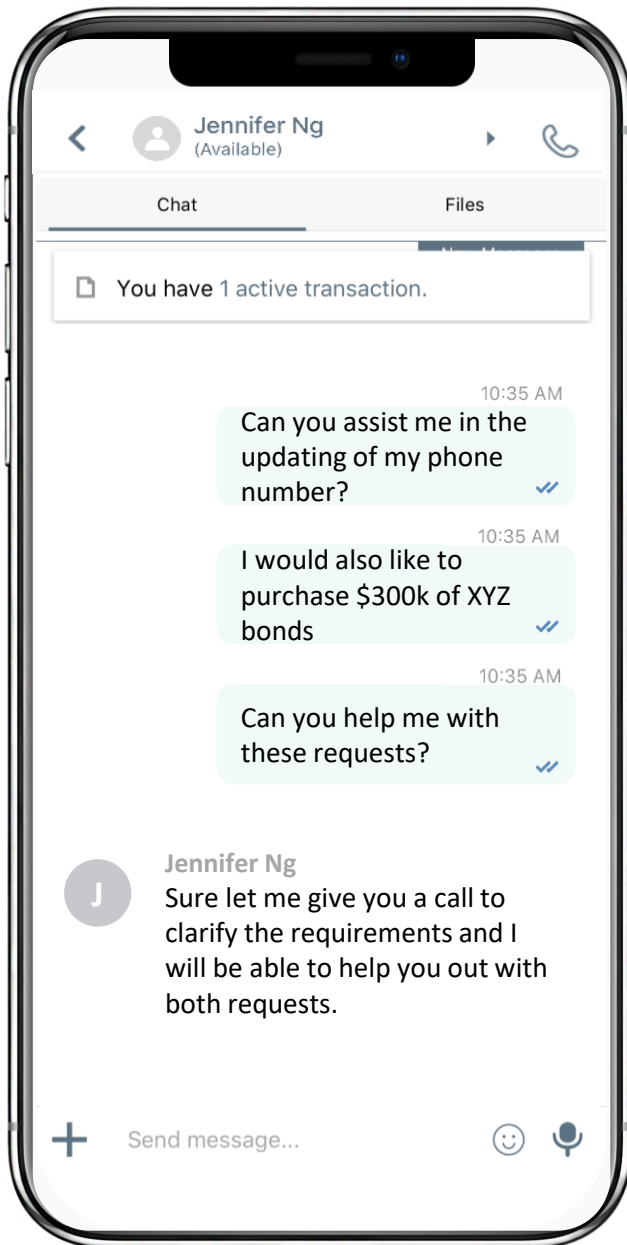
- 1. Group chat with your Relationship Manager and specialist support team**
 - 2. Chat with your Relationship Manager**
-

Conduct voice calls by clicking on the phone icon next to your Relationship Manager's name. Your Relationship Manager's online status is indicated below his/her name.



**Click the 'Video' icon to switch to a video call if you prefer a face-to-face interaction.
All voice and video calls made on the platform are recorded.**



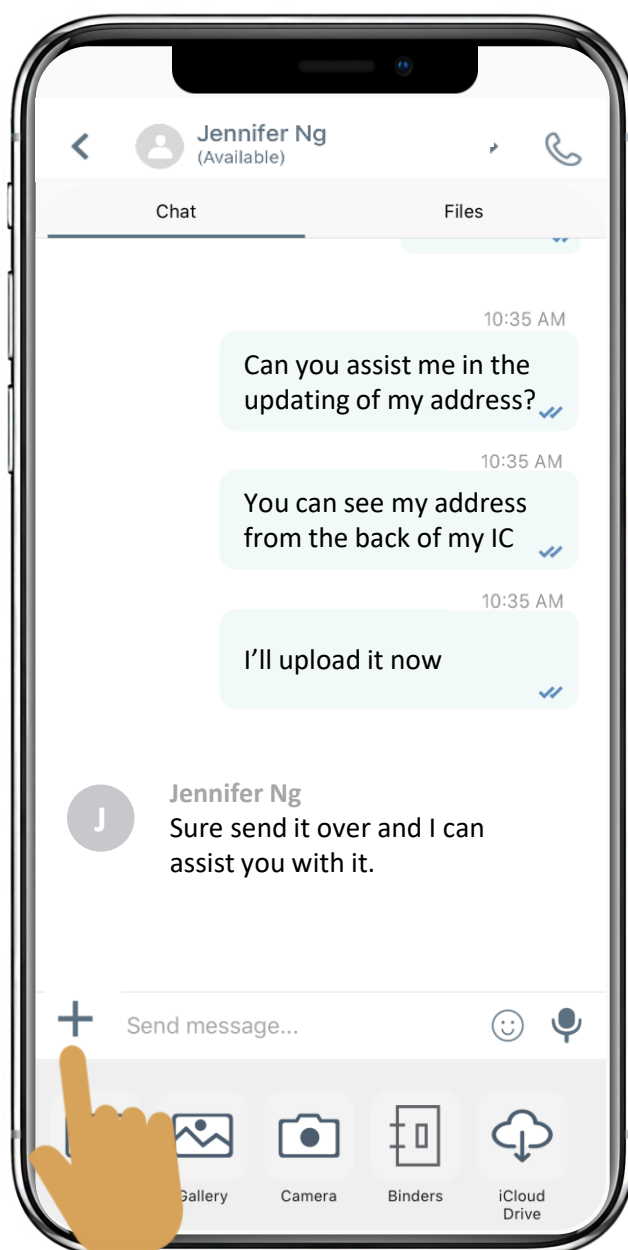


You can ask your Relationship Manager to help you with the following services:

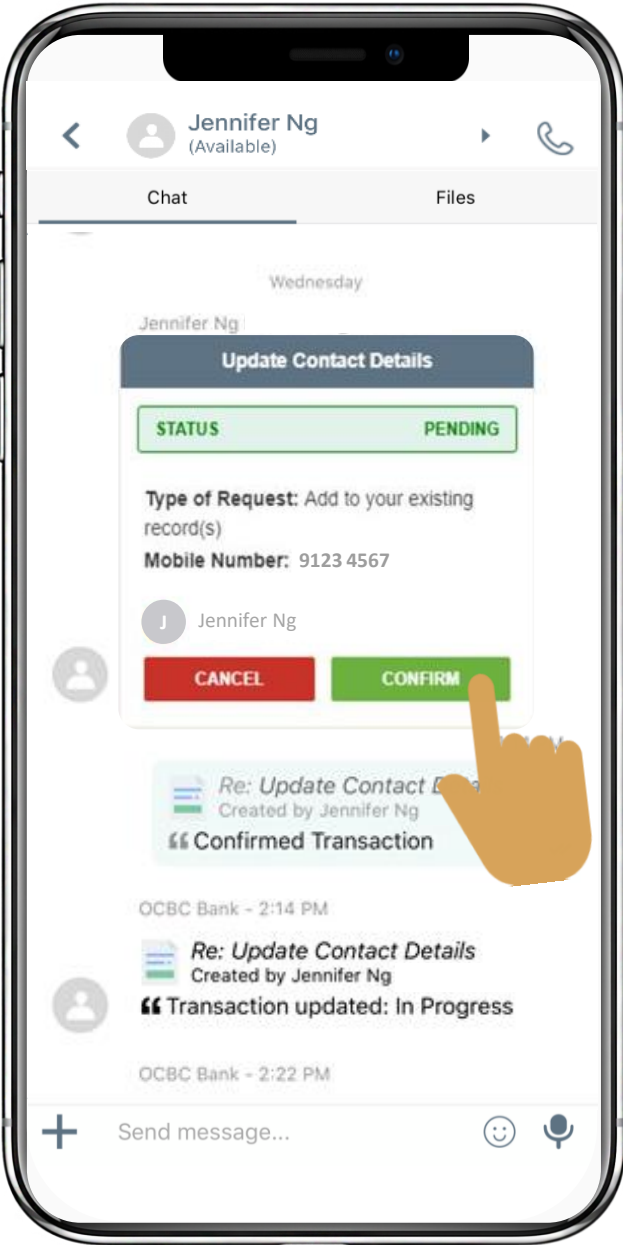
- 1. Update your contact details**
- 2. Update your address**
- 3. Your preferred delivery mode for Wealth Report**
- 4. Member-Get-Member Referral programme**

In addition to these services, you can also request for investment trade services.

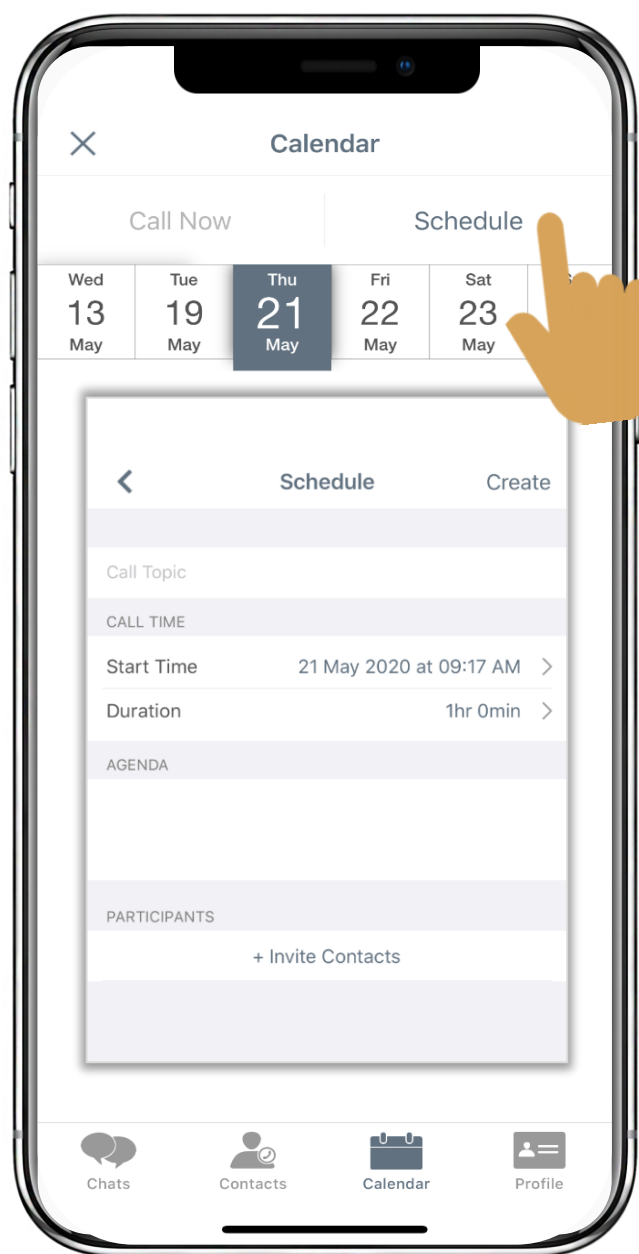
When processing your service requests, you may be required to share relevant documents with your Relationship Manager. Click on the ‘+’ icon to attach the document from your gallery, camera, and online drive, etc.



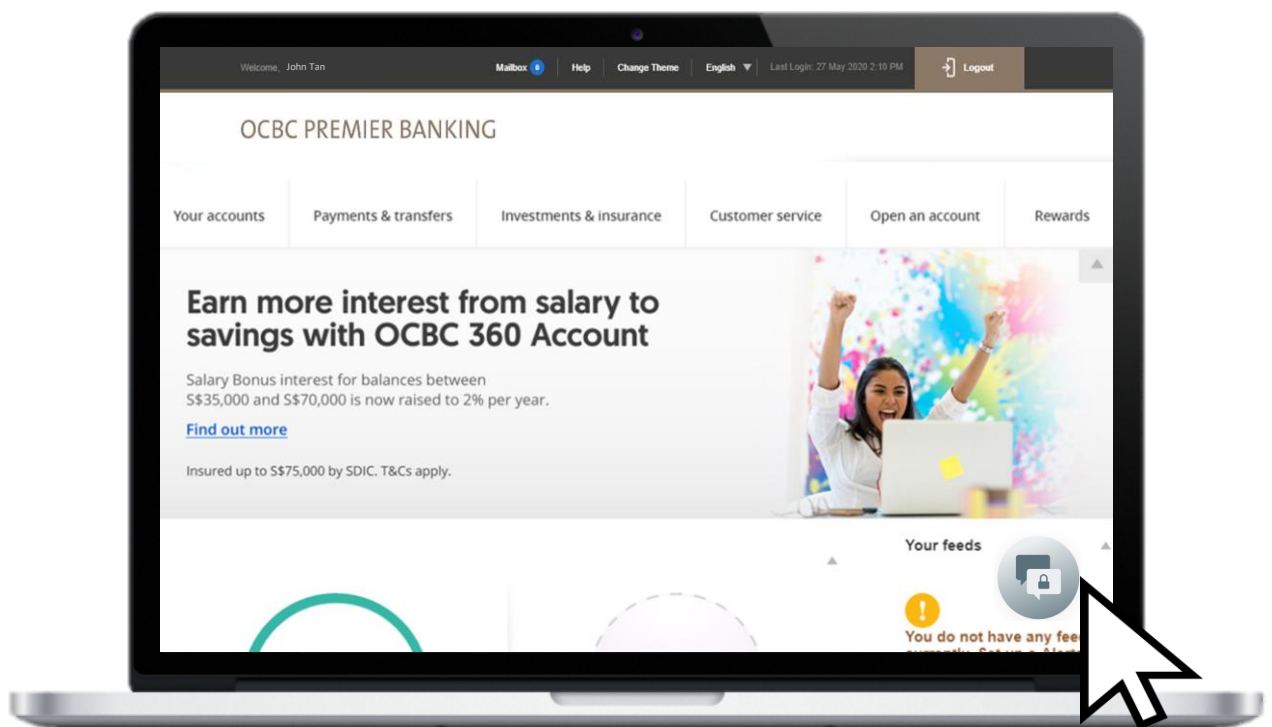
Verify service and trade instructions by clicking the ‘Confirm’ button. If you do not have OneToken, you will need to perform an authentication with your hardware token to proceed.



To schedule the next appointment with your Relationship Manager, go to the 'Calendar' tab and click on the 'Schedule' button. Fill in the details of the scheduled call in the subsequent screen.



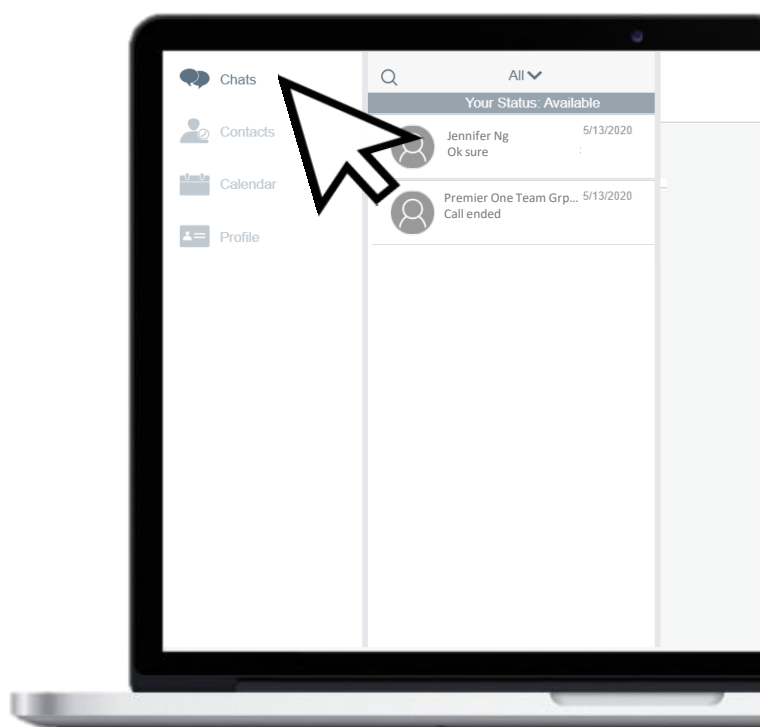
Log in to OCBC Internet Banking
and click on the  icon to launch
the new RM Chat service.



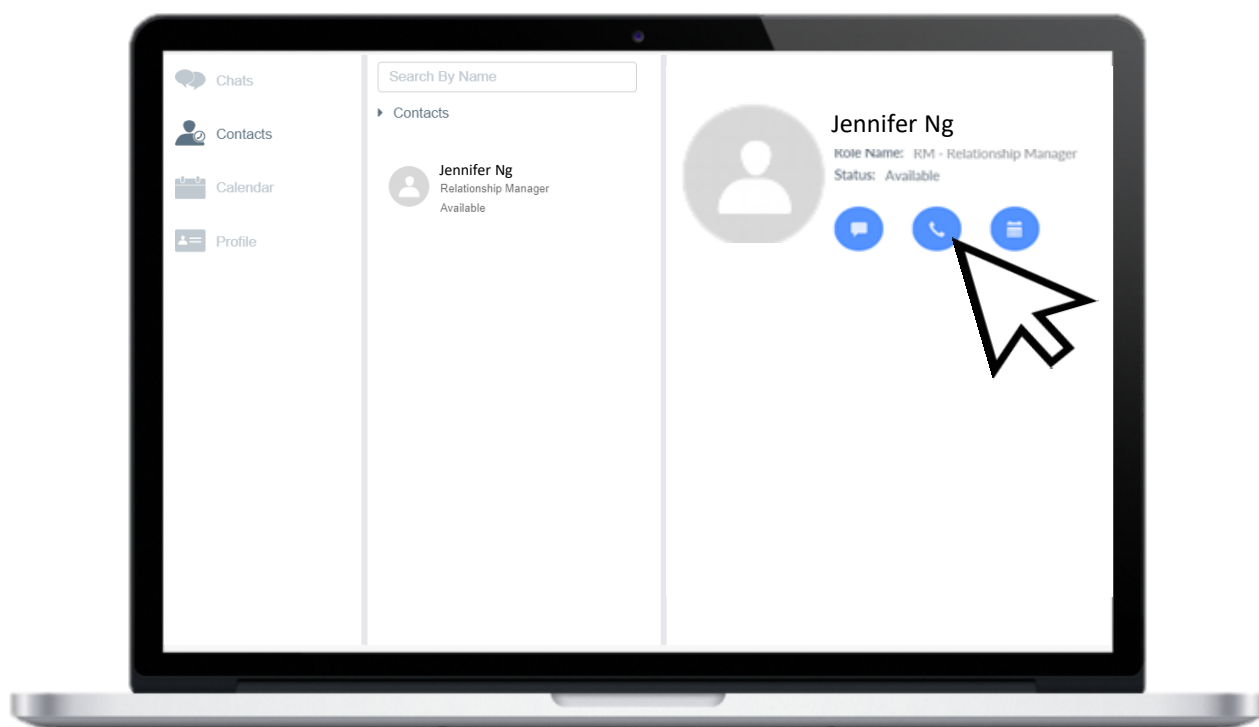
Chat with your Relationship Manager and/or Premier One Team conveniently via instant messages.

You will see 2 chats:

- 1. Group chat with your Relationship Manager and specialist support team**
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**Click 'Contacts' to view your Relationship Manager's contact details and availability.
Conduct voice calls by clicking on the phone icon below your Relationship Manager's name.**



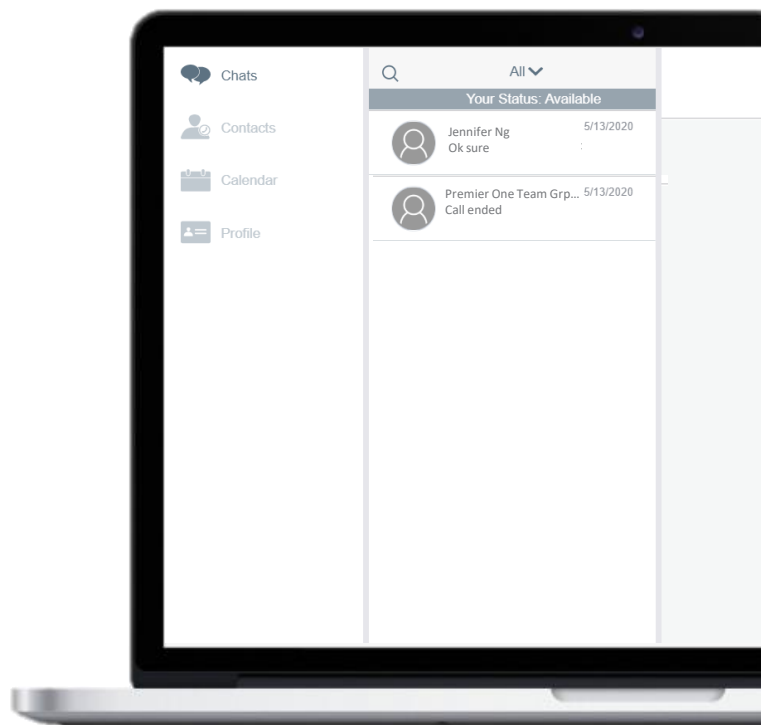
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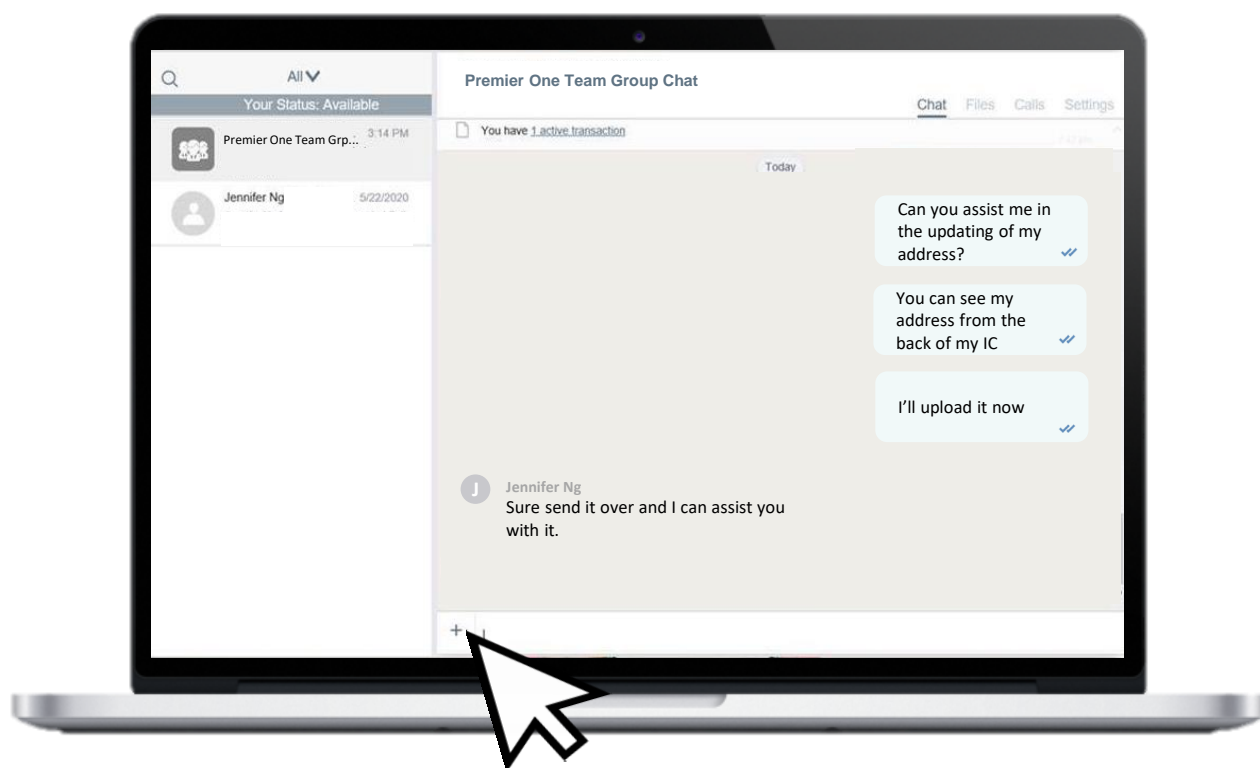
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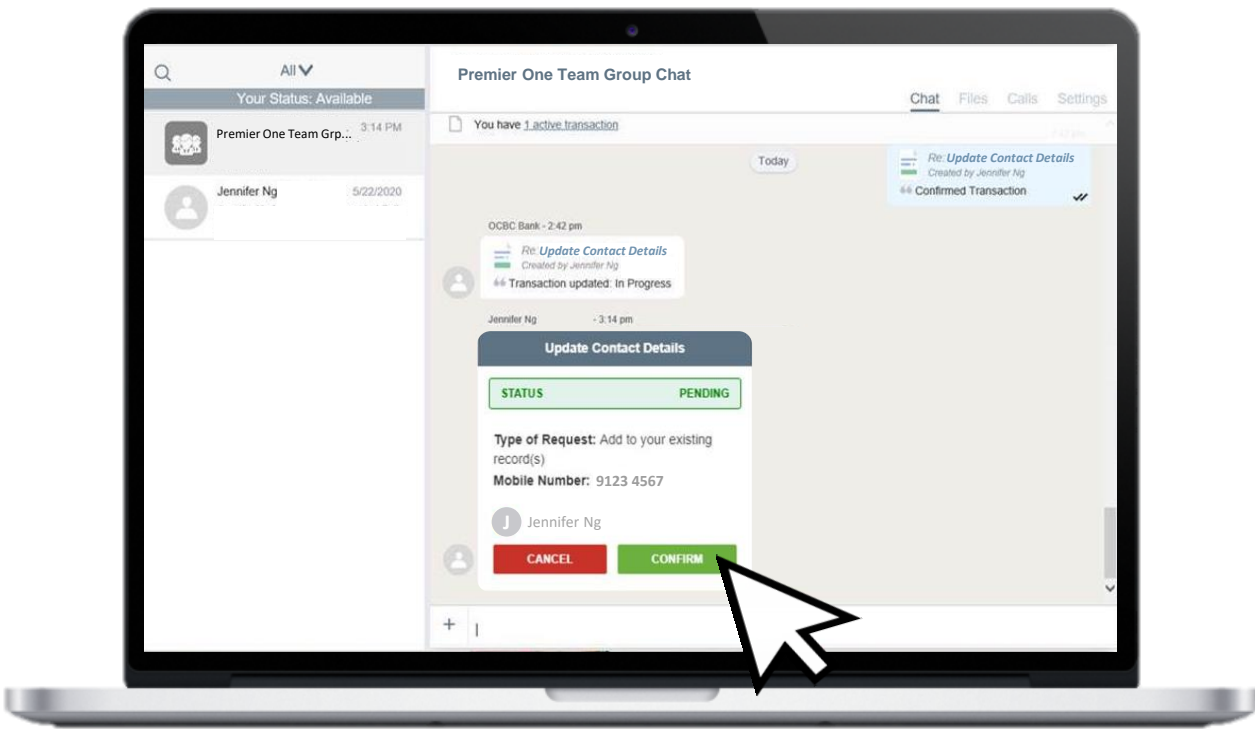
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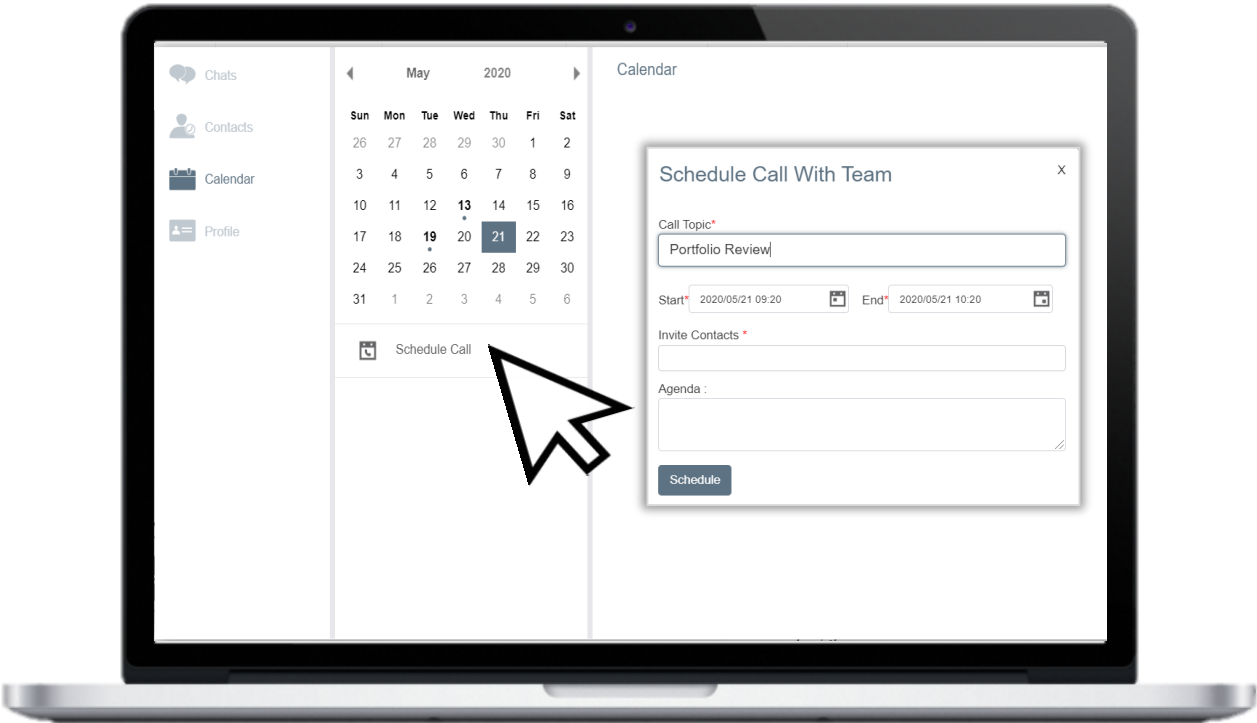
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To schedule the next appointment with your Relationship Manager, go to the ‘Calendar’ tab and click on the ‘Schedule Call’ button. Fill in the details of the scheduled call in the subsequent screen.





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