

Strateo - Your starter kit

What do I receive as a new client?

Each account holder and mandatory will receive his/her own passwords. These passwords are sent in two separate letters. Each letter contains an essential element required to access the secure site as a client.

Letter 1 : Your login (username): This login (starting with KS) is unique and unchangeable. You use it each time you connect on the secure site. If you become account holder or mandatory of multiple accounts, you will have access to all your accounts with this login.

Letter 2 : Your QR code is secured. Your login and QR code are required in order to log on to the secure site the first time. Then, you will use your smartphone to scan the QR code requested to log in or to confirm your transactions.

Your first visit to the secure site

Once you have received the 2 letters, you can log on to the secure site thanks to your login (username) and SoftKey. In order to activate your SoftKey, please follow these steps:

1. Download the "Strateo for mobile investors" app on the Appstore (iOS) or on Google Play (Android). Then follow the steps to create a profile, select "SoftKey" as the identification method and create a 6-digit PIN code.
2. Scan the secure QR code (which you received in the second letter)

Once the activation is complete, you can log in, trade and sign your transactions with your SoftKey. You will be asked to complete a knowledge and experience test. This one will be unique and will only take a few minutes.

To log in afterwards, all you need is your username and scan the QR code on your PC screen (if you log in from your PC). **To avoid being blocked if you lose or block your smartphone, we recommend that you activate an additional SoftKey.** To activate an additional SoftKey on another smartphone / tablet, go to www.strateo.ch from your computer and then to "Your preferences > Authentication". If you don't have a smartphone or tablet, choose the HardKey, a physical digipass. Please contact our customer service department on +41 (0)22 715 20 20.

How to transfer securities to your new portfolio?

The first possibility is to instruct your current bank to deliver your securities to your portfolio at Strateo. Alternatively we can take care of the process for you.

If you would like to mandate us to arrange the transfer on your behalf, please return a duly signed copy by post of the document "Mandate Securities Transfer". You can find the document in the Document Center on the website. Strateo charges no fees for incoming securities.

How do I fund my account?

Your account at Strateo is a trading account and not a traditional current account. The easiest way to transfer money to your account at Strateo are via online transfers.

Please indicate Strateo as beneficiary and add your name plus your trading account number in the comment field. Please check the document "How to fund my account" for the detail of the different IBAN numbers to be used according to the currency of your transfer.

Alternatively you can use the BVR (Red Impayment slip) which you have received if you are a Swiss resident. Please indicate your name and trading account number in the field for comments/reasons of the transfer.

How do I make an outgoing transfer?

On the secure website, you can instruct an outgoing transfer in favour of the reference account that you have indicated in your account application form. For outgoing transfers to other accounts, please provide us with your detailed signed instructions by fax, email with scan or by post. A cash withdrawal in CHF or EUR is possible at our offices (2 days prior notice is required).

The bank charges CHF 2 for a payment to an account in Switzerland and CHF 15 to an account abroad.

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What is my account number?

Your account number is mentioned on the welcome letter you have received. You can find your account number when you log on to the secure site on the landing page on the left hand side (ex. 130000-01).

In which currency is my account?

Your account is multi-currency and you can choose which currency will be used as your reference currency. You can change this under « Your Preferences » - « Currency ».
You can find your cash balance in each currency by clicking on your account number. There is no automatic change except in order to cover a negative balance in a certain currency.

How do I find the price of a share?

You can find shares (or other financial products) very easily. Please click on « Trading » and « Invest » on the homepage of the secure site to find the search engine. You have the option to search on Symbol, name or ISIN and by market.

An easy and quick way is also to type name or symbol in the « search » function which you find on the top right on the homepage.

How do I activate real-time quotes?

In order to activate real time quotes, please activate them under “Your preferences” - “Quotes”. We offer real time quotes for 7 market groups. Please confirm your activation of real time quotes by scanning the QR code with your smartphone.

Real time quotes are offered free of charge for the Swiss market (Group 9 has to be activated). Other markets are free of charge from 3 trades per month for the relevant market group.

For any questions please contact us 0800 15 20 20 (from abroad: +41 800 15 20 20), by email info@strateo.ch or via Skype (ID strateo.ch) between 8:30 am and 6.00 pm (Monday to Friday).

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