

Quick Guide to Rizal UITF Online Investing

1. Log-in to your RCBC Online Banking Account. (No RCBC Online Banking Account yet? Go to www.rcbc.com and click on "Go" beside the RCBC Online Banking button found at the upper left corner of the page. Click on "Enroll Now" button and follow the enrollment instructions.)
2. Click on the "Invest in UITF" icon.



Note: If you do not see the "Invest in UITF" icon, click on the "Security" icon found on the upper right corner of the dashboard.



Click on: MY SETTINGS -> Display Settings

Put a check mark on the box beside "Invest in UITF". Click on "Save Changes" and then click "Home". You should now see the "Invest in UITF" icon displayed on your dashboard.

3. Choose whether you wish to open a new UITF Account or enroll your existing UITF Account.

To enroll your existing UITF account, be ready with the Confirmation of Participation No. (COP No.) of the UITF you wish to enroll.



The COP No. is found at the upper right corner of the COP

4. Read and understand the Terms and Conditions for Rizal UITF Online Investing. Click on "Agree" button if you accept the terms and conditions.
5. Confirm your basic client information.
6. For new accounts, Accomplish the Customer Suitability Assessment (CSA) which will help evaluate your profile as an investor and determine which Rizal UITFs are suitable to your profile.

For existing UITF accounts, put the applicable Currency, Fund Type and COP No.
7. Select the Rizal UITF you want to open and invest in (for new accounts only).

8. Read the Risk Disclosure Statements (RDS), Other UITF Disclosures and Participating Trust Agreement (PTA) to help you understand the nature of UITFs, the risks involved and the terms of the agreement. Click on the "Agree" button for each document to signify your acceptance.
9. Provide your preferred date and time with your contact details which will be observed by RCBC Trust Marketing when they call you to:
 - Confirm your investor profile
 - Explain the nature of UITFs, as well as the general risks incidental to UITF investments and the specific risks for the UITF you have selected.
 - Confirm if you have complete and updated current or savings account opening documents in your branch of account.
10. Expect to receive two email confirmations for the enrollment process:
 - When you have submitted your application for enrollment
 - When your account enrollment has been approved.
11. You may start investing as soon as your enrollment has been approved!

Congratulations! You are on the right track to achieving financial freedom. Enjoy the convenience!

For further inquiries, comments or suggestions, you may send us an email at uitfonline@rbc.com Thank you!