



Online Onboarding

- Digital asset management -

The way to your strategy portfolio is quite simple.

1. Preparation

You will need the following for the online onboarding process:

- Valid identity card or passport
- Tax identification number
- IBAN of your current account, for direct debit of deposit amount
- Smartphone or tablet with installed IDnow app (download from App Store or Play Store)
- Smartphone or mobile phone for IDnow PIN reception via SMS

2. Your registration

- Open <https://stoll-tillson-hdvm.vermoegensportal.de>
- Click on 'Register' in the upper right corner.
- Enter e-mail address and set up access data incl. password (at least 8 characters incl. capital letters, and a number)
- Consent to data protection and terms of use
- Confirm entries by clicking on 'Register'
- You will then receive an e-mail message with a link that you confirm by clicking on it.
- You will be redirected to the initial page. Click 'Invest' on the right
- and log in with your access data. The investment process begins.

3. Your investment objectives and data

- Please be sure to fill in the points conscientiously! See questions below about: investment period,
- investment objective, risk profile, experience, monthly income surplus,
- liquidity reserves, freely available assets and desired investment amount.
- Personal data: Please ensure that all entries are consistent with your identification document.
- All documents are provided as specimens for your preliminary information. (A folder now opens!)
- Please check and confirm your data!
- Make a note of the IDnow process number displayed.

4. Identify yourself using IDnow

- Almost there!
- Now open the IDnow app on your mobile phone, tablet or computer and enter

- your transaction number.
- You will be connected to a staff member.
- This person will ask you for your name and the occasion. (V-Bank securities portfolio opening)
- Hold your ID card up to the camera. Your ID card will be photographed from
- different angles.
- After data synchronisation you will receive an SMS with an ident code;
- now enter this code in the IDnow app.
- Finished! Your securities account will now be opened automatically.
- This video explains the identification process:
<https://www.youtube.com/watch?v=mt51xitBJ4k>

5. If you have any questions, I will be pleased to assist you

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