Citibank Mobile App – Customer Profile





Screen 1 Step 1: Click the Profile Icon





Screen 2 Step 2: Scroll to 'Update your Investor Profile & W8 BEN'



Screen 3

Step 3: Select 'Investor risk profile' OR Step 4: Select 'Knowledge & Experience only risk profile' (Please select this only if you wish to provide us with limited information about your knowledge & experience in wealth management products)



Step 5: Click 'Update profile' or 'Start profiling'



Screen 5 Step 6: Update Residential Status



Screen 6 Step 7: Update education details



Screen 7 Step 8: Update employment details



Screen 8 Step 9: Update source of income

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Screen 9 Step 10: Update Cash, Savings & Loans



Screen 13 Step 14: Select preferred Time horizon of your investments



Screen 17 Step 18: Respond to the questions based on your Risk Appetite



Screen 10 Step 11: Update Investment, Credit Card & Loans on Financial Assets



Screen 14 Step 15: Share details on your Risk Attitude

stor Risk Profile

ent Knowledge & Experience

tor Risk Rating is Risk Rating

Screen 18

Step 19: Calculate your

Investor Risk Rating



6



Screen 15 Step 16: Share details on your Knowledge Assessment



Screen 19 Step 20: Click on 'Proceed'



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Screen 12 Step 13: Select currencies which you are comfortable to invest in



Screen 16 Step 17: Elaborate on your Knowledge & Experience





Please follow below steps if your total net worth in your existing active investor risk profile with Citibank NA UAE is greater than or equal to AED4MM and if you wish to update your client category classification to a 'Professional Investor'. As part of this update, we would also request you to upload a document which serves as evidence to prove your total net worth.

Buy Equity & Mutual Fund on Citi Mobile App Citic on Threat" tab below Miles/Funds-38% C 3,543	
Deposits AED 102,742.41	~
D-statements	>
Foreign Currency Deposits AED 3,720.39	~
Credit Cards OVERDUE PAYMENT AED 39.00	Ŷ
Pay your statement to avoid late charges 3874	>
Investments AED 133,120,58	~

Screen 1

Step 1: Click on the Profile Icon



Screen 3 Step 3: Select Professional Investor Update



Screen 6 Step 6: Upload the proof Step 7: Acknowledge by selecting a tick box Step 8: Click submit





Screen 2

Step 2: Scroll down to update your Investor profile and W8 BEN





Screen 4 Step 4: Click 'Get accredited as a Professional Investor'



Screen 7 Step 9: Your submission is received

Screen 5 Step 5: Click 'Proceed'