

Piguet
Galland &
vous.



eBanking Guide My Piguet Galland

Introduction

Welcome to My Piguet Galland eBanking

This explanatory document details the essential features of the platform and guides you to get started. If you encounter difficulties or need assistance with using My Piguet Galland eBanking, please do not hesitate to contact us. Our support team will be happy to assist you.

My Piguet Galland eBanking offers a variety of comprehensive services designed to make your online banking experience intuitive and enjoyable:

Payments: Make national or international payments and transfers at any time, wherever you are.

Overview of your wealth: Track the evolution of your assets, the value, and performance of your portfolios.

Composition and performance of your investments: Quickly analyse the performance and composition of your investments through a clear interface.

Services: Access and download your personal documents, consult the various Piguet Galland services.

[Link to the eBanking](#) →

Sommaire

01

Pg 4

Installation on your device

02

Pg 6

Registering your device

03

Pg 10

Overview

04

Pg 14

Composition and performance of your investments

05

Pg 21

Payments and transfers

06

Pg 31

Services – Documents – More

07

Pg 35

Q&A

01

Installation on your device

Installation on your device

Find our application on the App Store and Google Play Store.

1. Search for "My Piguet Galland" in your store.
2. Download the application.
3. Have available your eBanking username and password which you received by post.
4. Follow the instructions displayed on your phone.

02

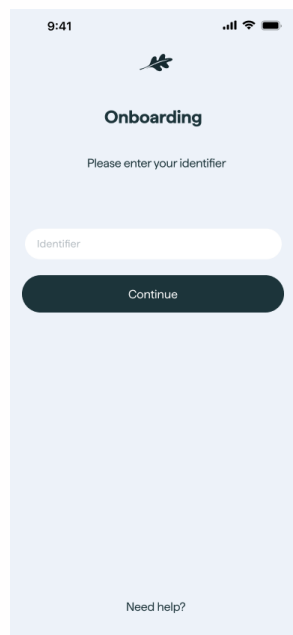
Registering your device

First login using the mobile application

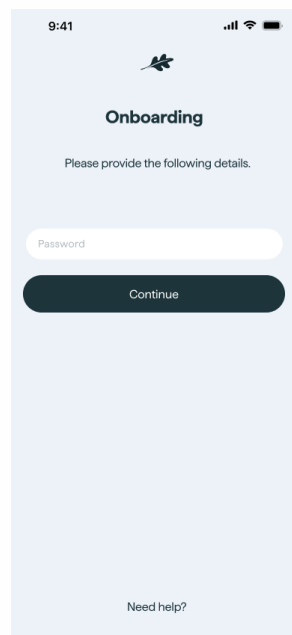
Click on 'Start Enrolment'



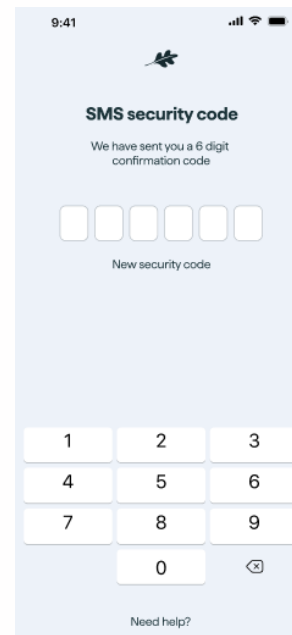
Enter your username



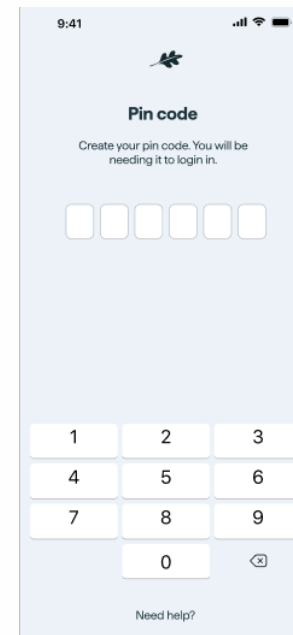
Enter your password



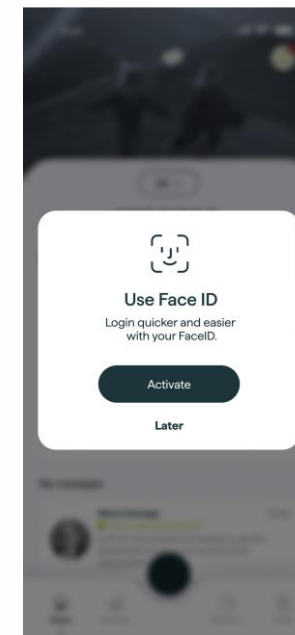
Enter the code received by SMS



Create your PIN code



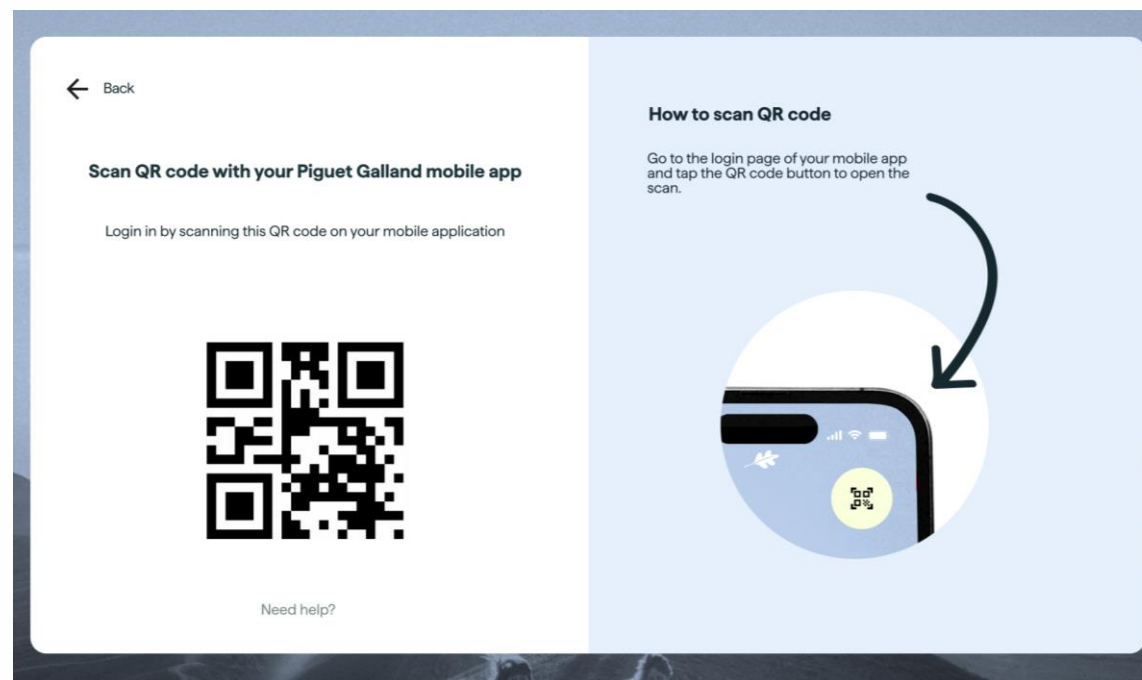
Biometric activation possible from the first login



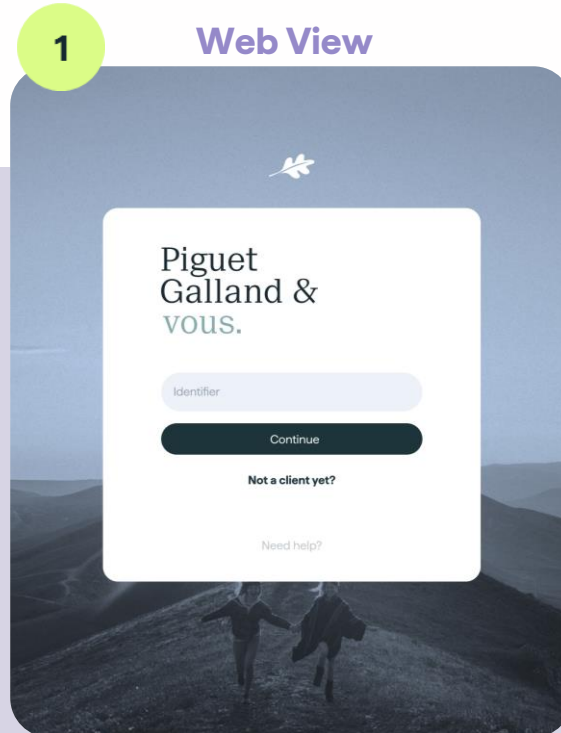
A video tutorial is available in our online academy. Click here to watch it or visit our website www.piguetgalland.ch/academy

First connexion: installation of the mobile app

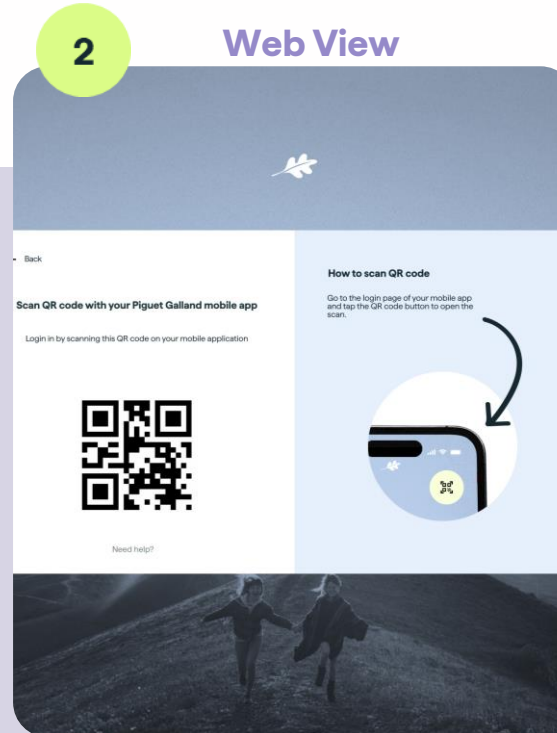
Please note that it is not possible to log in to the web application without **first registering your phone** through the mobile app.



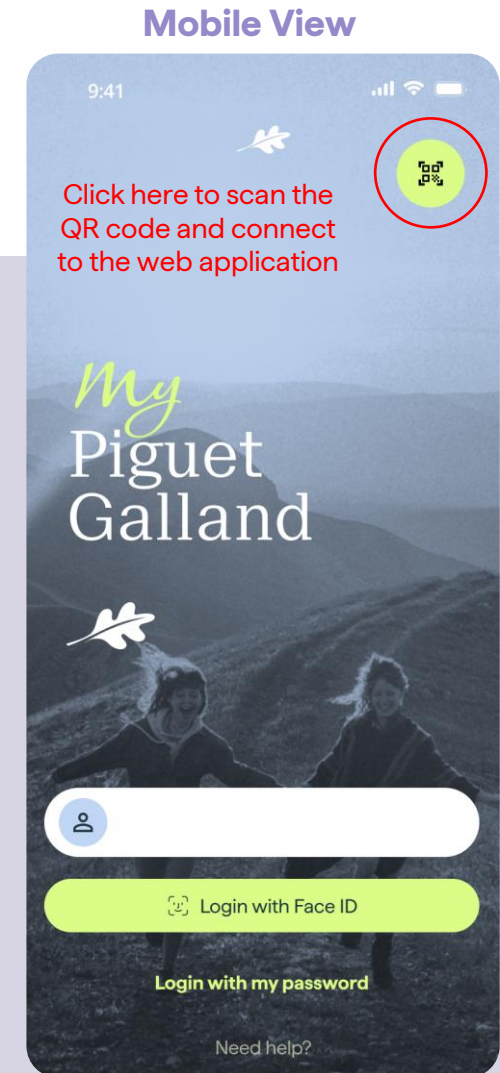
Web login



From your internet browser, go to this URL and enter your username:
<https://ebanking.piguetgalland.ch/>



Scan the QR code displayed on the web page with your My Piguet Galland mobile application

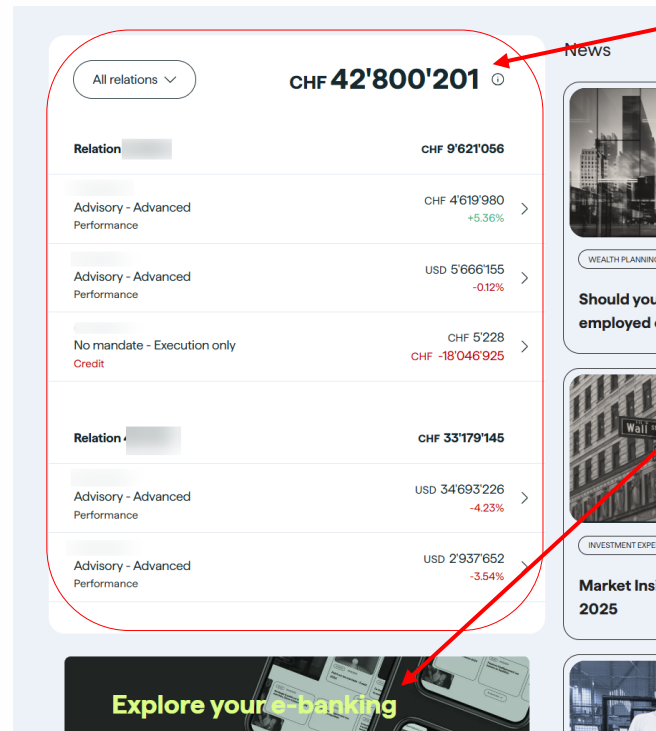


03

Overview

Your Overview

Web View



See my accounts

This feature allows you to hide your wealth from prying eyes. By clicking on "View my accounts," the portfolios appear.

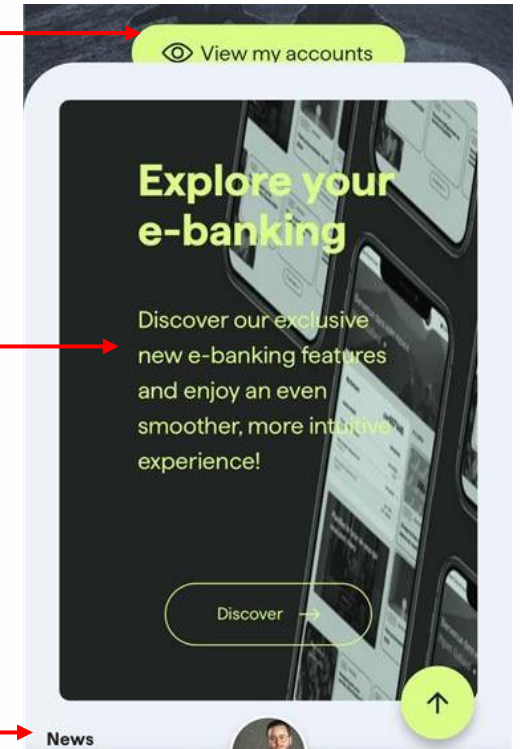
Highlight

Emphasis on a current theme.

News / Webinars / Events

Find the latest Piguet Galland news in this section.

Mobile View



News, webinars, and events are temporarily available exclusively for Swiss residents..

Overview

Your consolidated wealth and an overview of your portfolios and their performances

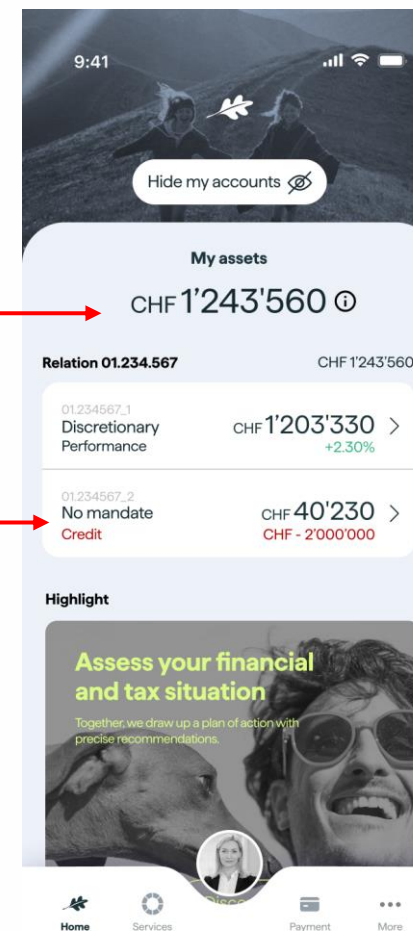
My consolidated wealth in CHF:

The portfolios of which you are the holder are taken into account in the calculation of this consolidated wealth. Credits are not taken into account.

Performance and loans:

The performance is displayed below the value of your portfolio, if the portfolio does not include loans. If the portfolio holds loans, the value of the loan is displayed instead of the performance.

The values shown on the home page do not include accrued interest.



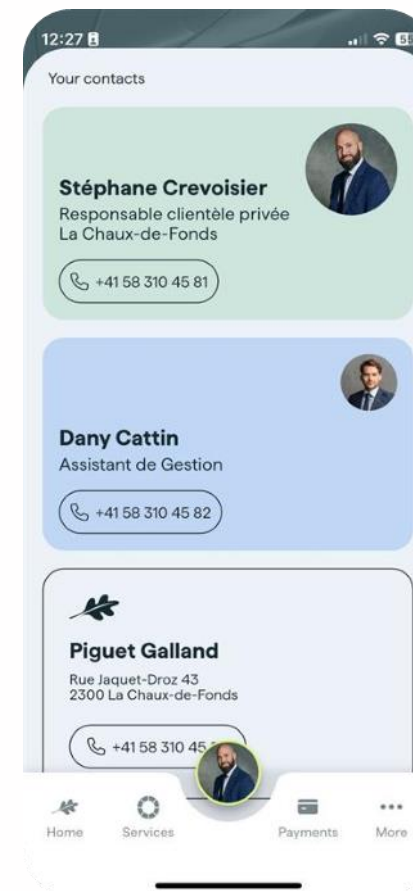
Contacts

Your Advisors at your disposal

Easily access your preferred contacts at Piguet Galland for personalised support and tailored advice to meet your needs.

Click on your Advisor's photo to open your contacts page. The photos of the Advisor, the Assistant, and the agency contact will appear in the contact section.

Your Advisor's photo appears on all pages of the website and the mobile application.



04

Composition and performance of your investments

Portfolio summary

From the web

Change of evaluation currency

Portfolios are shown in your chosen evaluation currency.

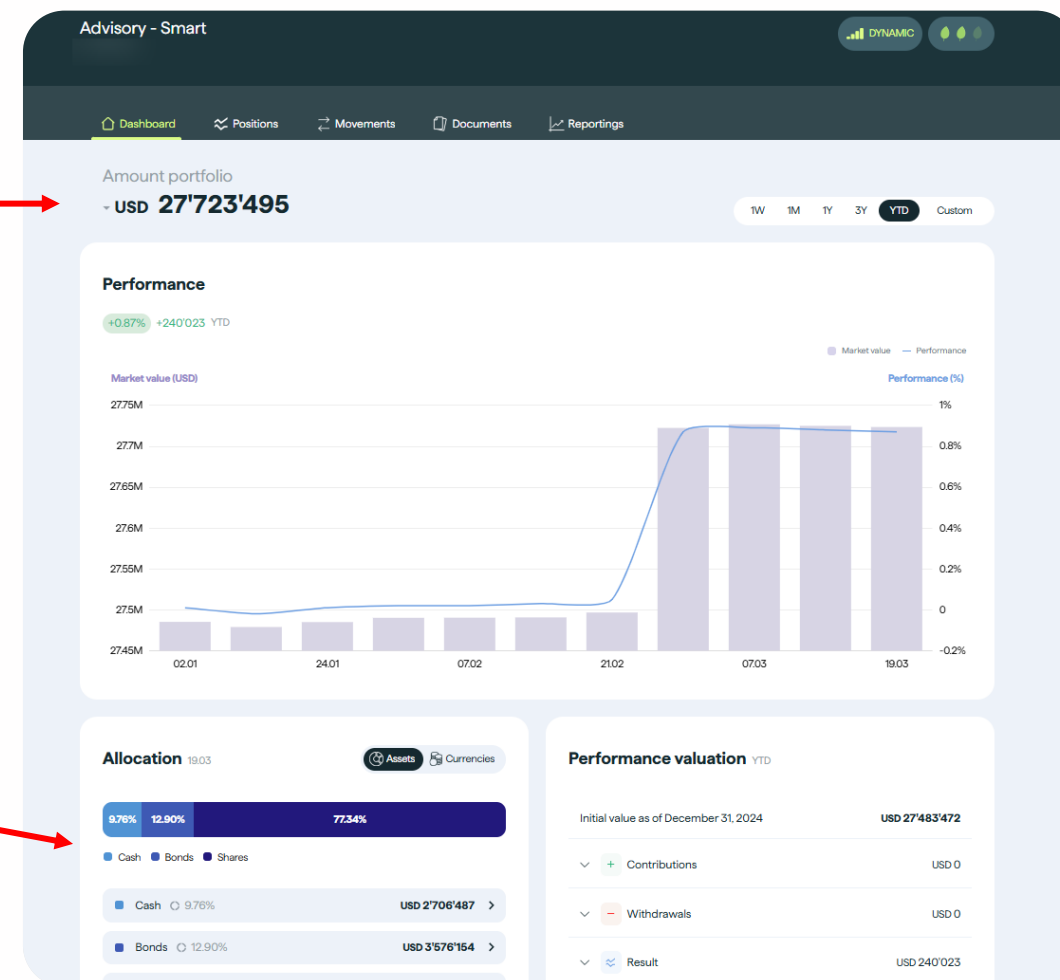
However, it is possible to modify this currency to view the evaluations in a different currency. This visualisation is active during the session. Upon reconnection, the portfolio will be back in its chosen evaluation currency.

Performance details

Simplified view on mobile and detailed on the web.

Presentation of asset classes

Grouping by asset class and sub-asset class.



Portfolio summary

From your smartphone

Change of evaluation currency

Portfolios are shown in your reference currency.

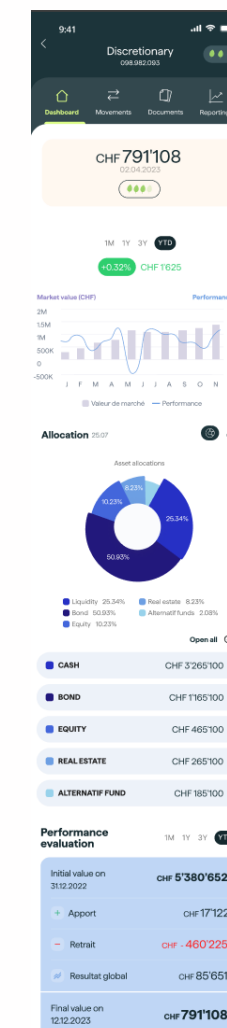
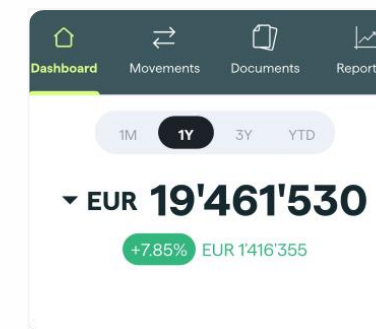
However, it is possible to change this currency to see the evaluations in a different currency. This visualisation is active during the session. Upon reconnection, the portfolio will be back in its usual reference currency.

Performance details

Simplified view on mobile and detailed on the web.

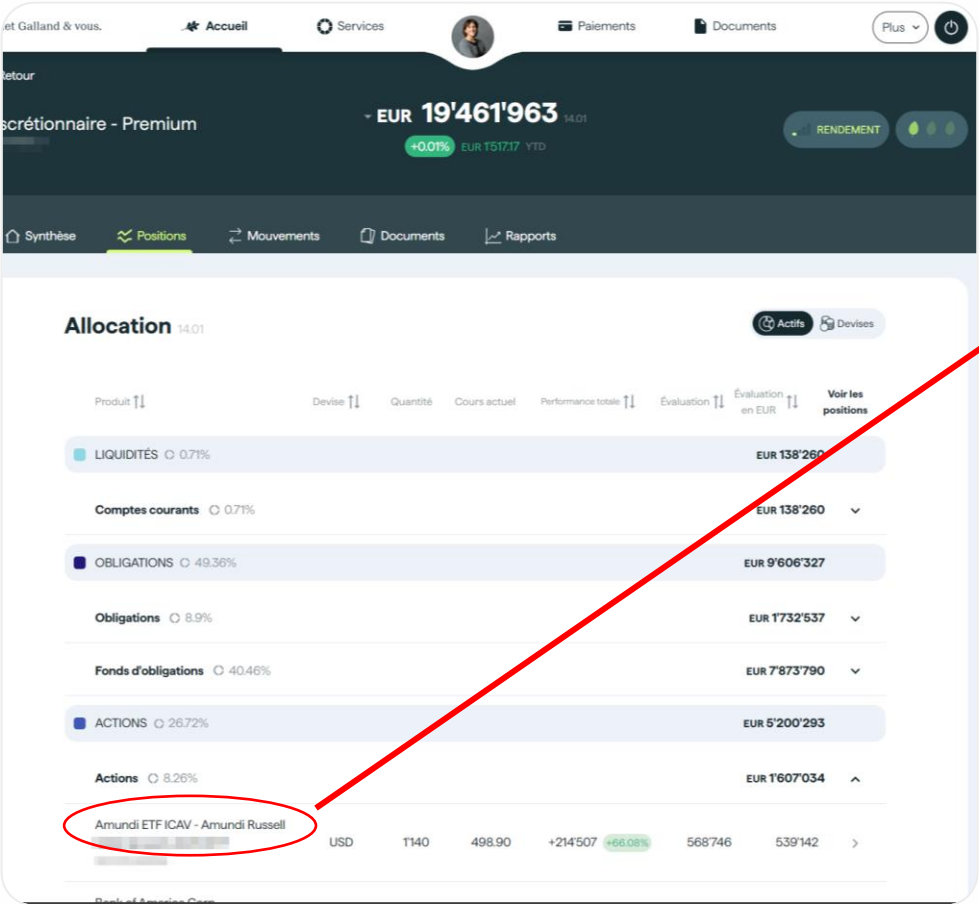
Presentation of asset classes

Grouping by asset class and sub-asset class.

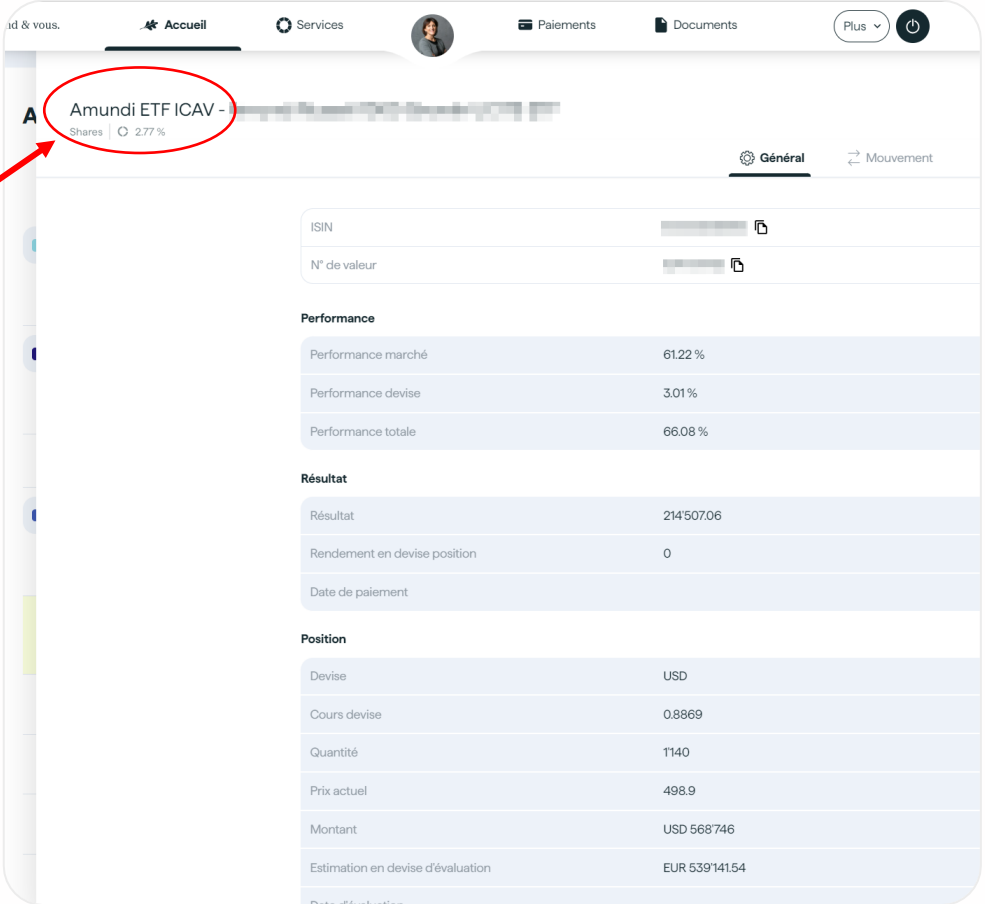


Portfolio: positions tab

Web View

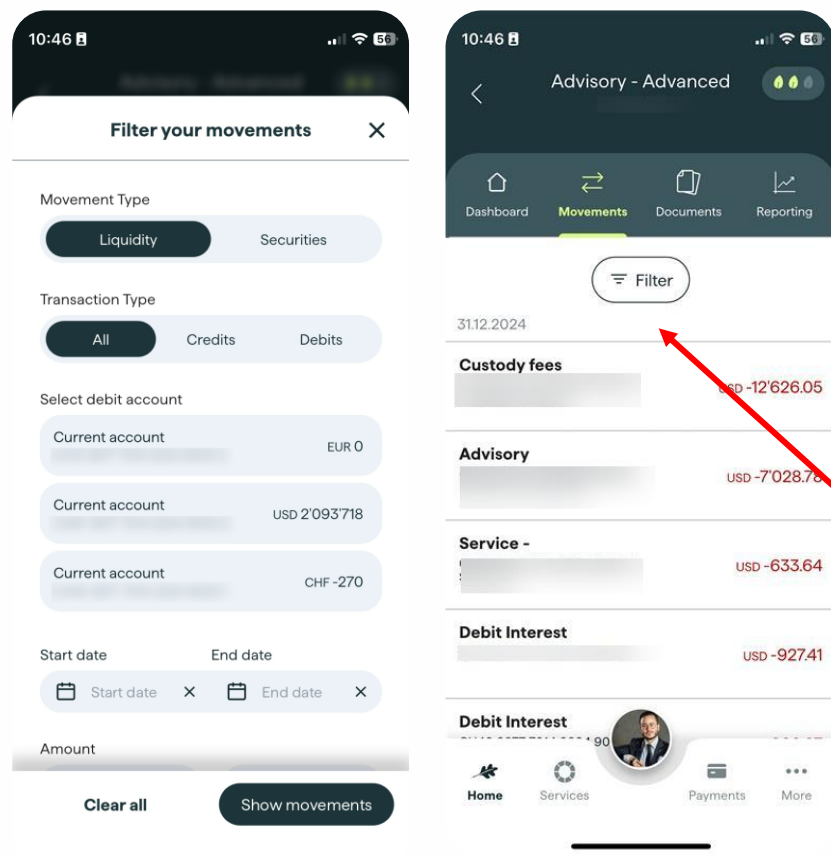


Web View



Portfolio: movements tab

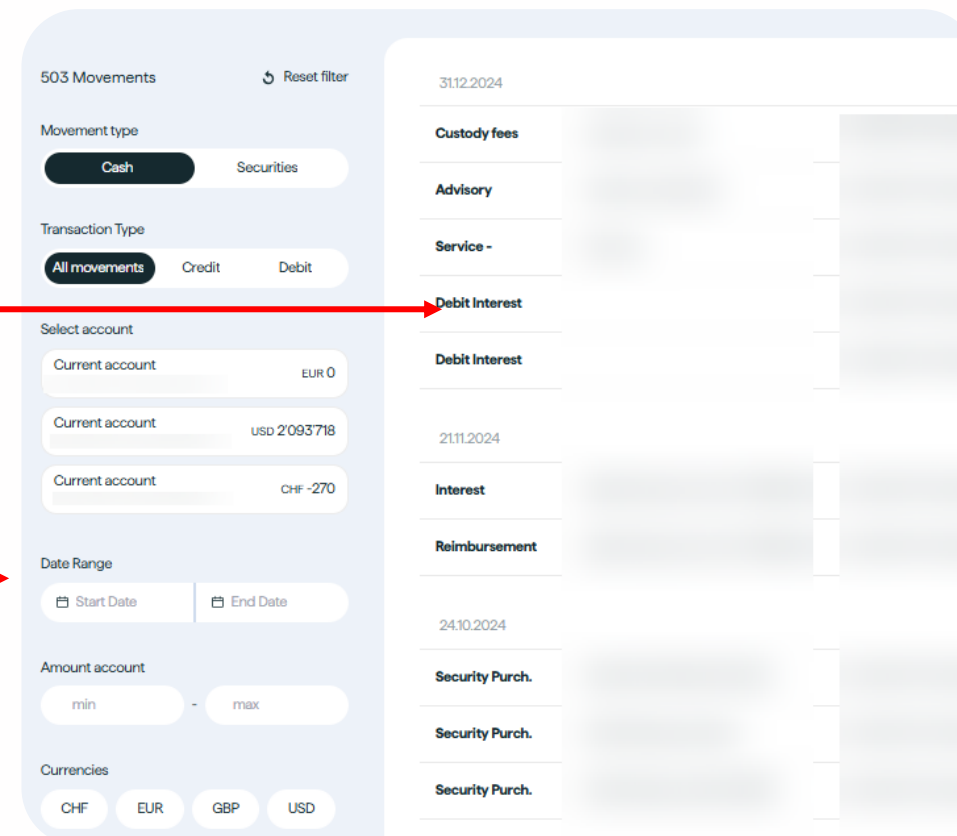
Mobile View



By default, a view with all portfolio movements.

A filter for advanced searches.

Web View

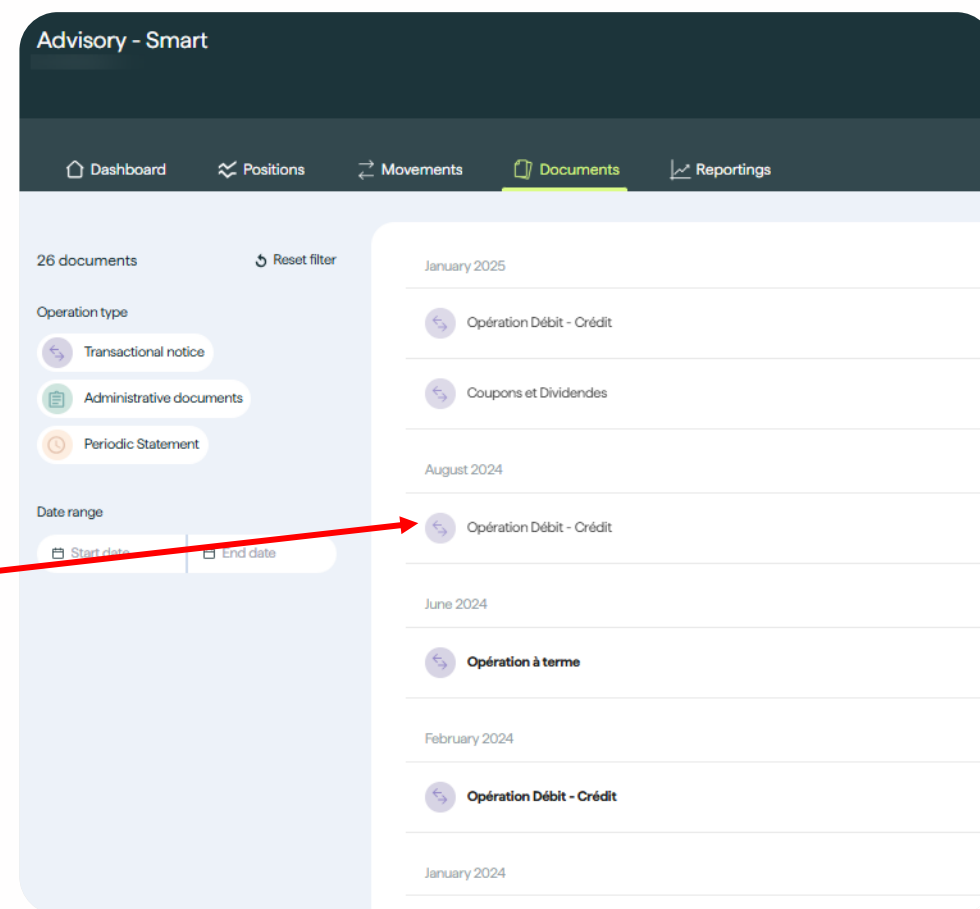


Portfolio: documents tab

Access to the documents related to your portfolios

Specific icons to differentiate the three possible types of documents: transactional notices, administrative documents, periodic statements.

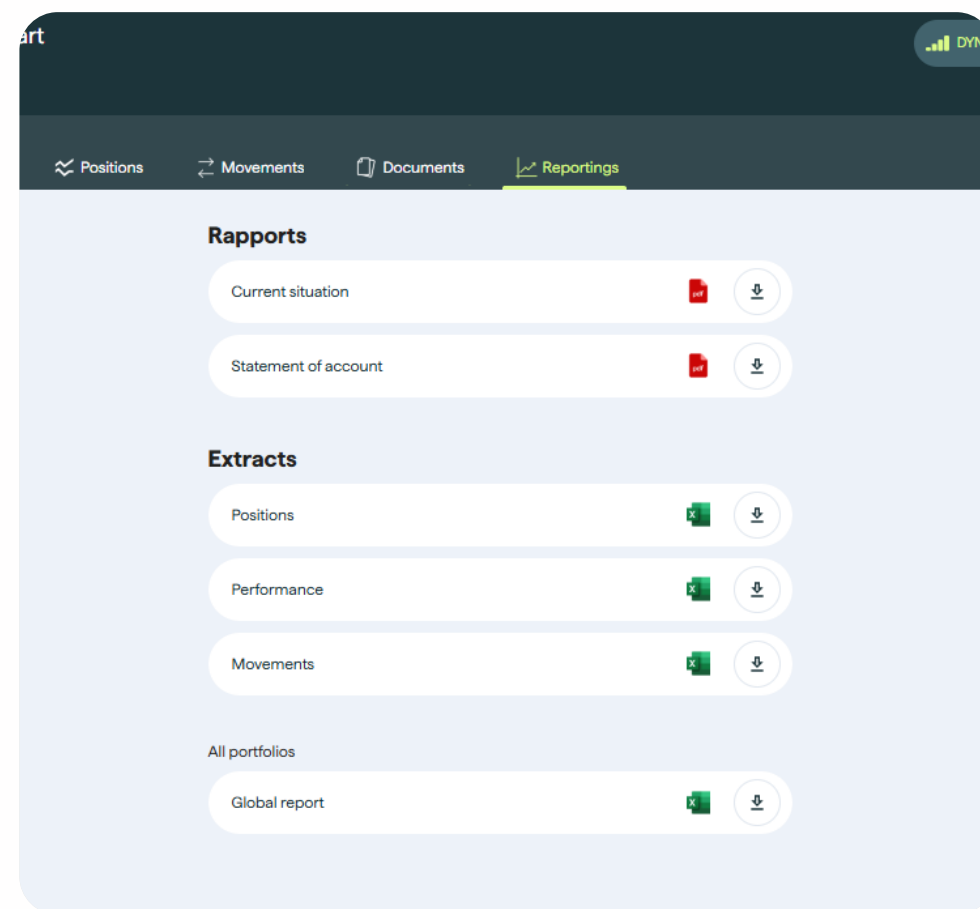
By clicking, the document is marked as read.



Portfolio: reports tab

Downloadable documents on demand concerning the portfolio:

- The account statement.
- The wealth evaluation (year to date in reference currency).
- A series of Excel reports available only via the web.



05

Payments and transfers

Payments:

Quick actions and status of payments

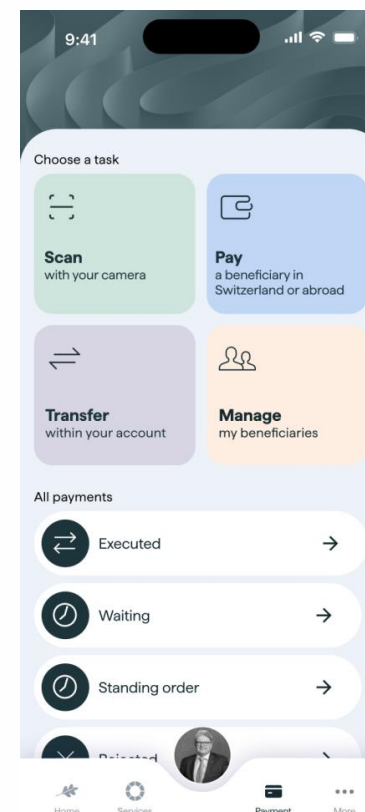
Possible quick actions:

- Make a payment by QR code via scan, or manually.
- Make account transfers to other Piguet Galland accounts.
- Use an existing beneficiary to make a payment.
- Schedule your standing orders.

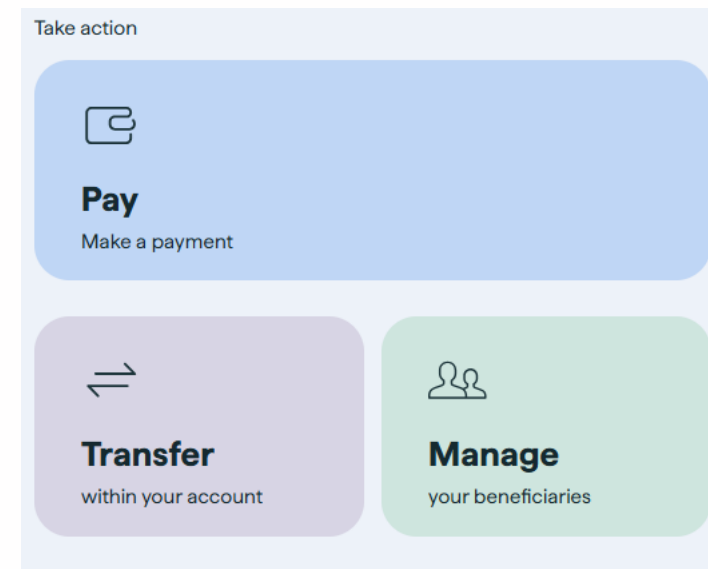
Status of payments:

- **Executed:** operation successfully completed.
- **Pending payments:** operation awaiting execution.
- **Standing orders:** operation executed periodically without your intervention.
- **Rejected:** payment attempt that could not be completed or validated.

Mobile View



Web View



Payments lists:

Four types of icons depending on the payment:

-  Payment in Switzerland in CHF
-  International or foreign currency payments
-  Internal Piguet Galland transfers
-  QR Invoice

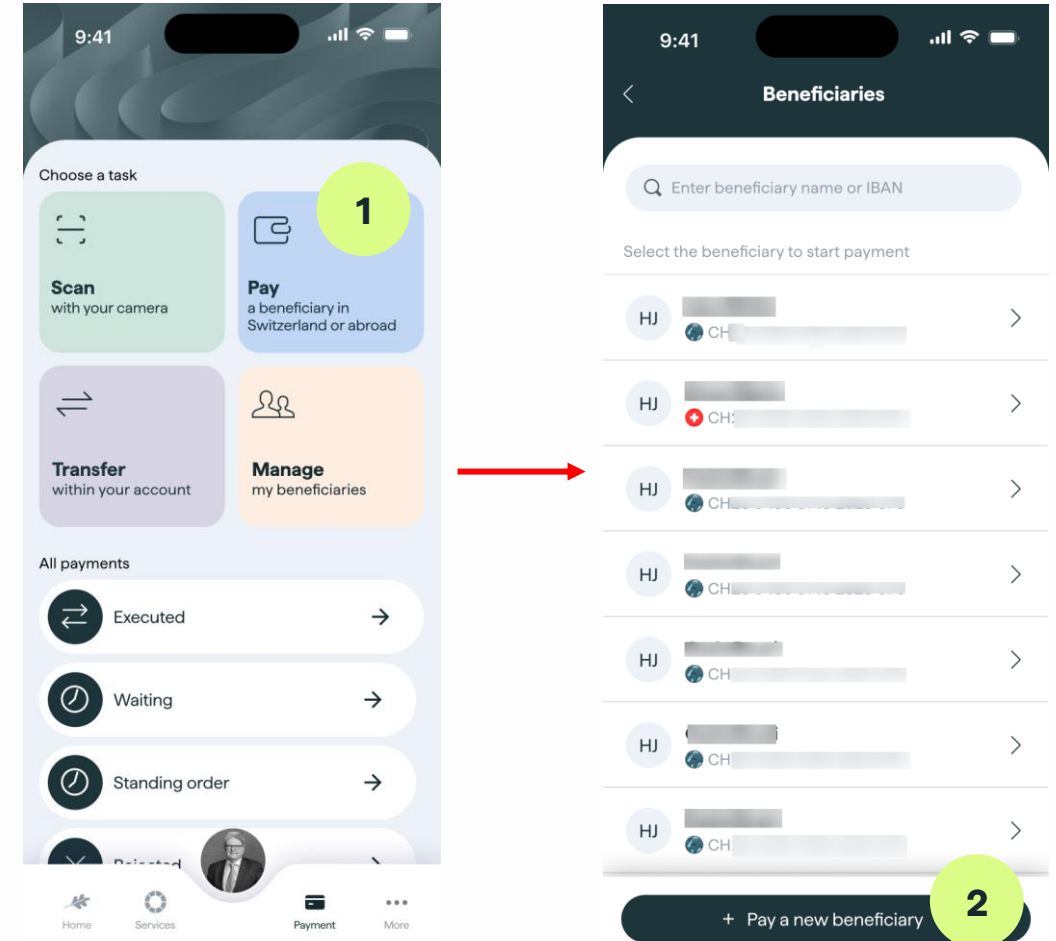
 Chercher par bénéficiaire		
Novembre 2024		
	Adam Smith	Paielement suisse (CHF) 01.11
Octobre 2024		
	Adam Martin	Etranger ou monnaie étrangère 24.10
	Adam Smith	Paielement suisse (CHF) 24.10
	Adam Smith	Paielement suisse (CHF) 24.10
	Adam Smith	Paielement suisse (CHF) 24.10

Pay with the app

Select a portfolio at the top of the page to access its list of registered beneficiaries.

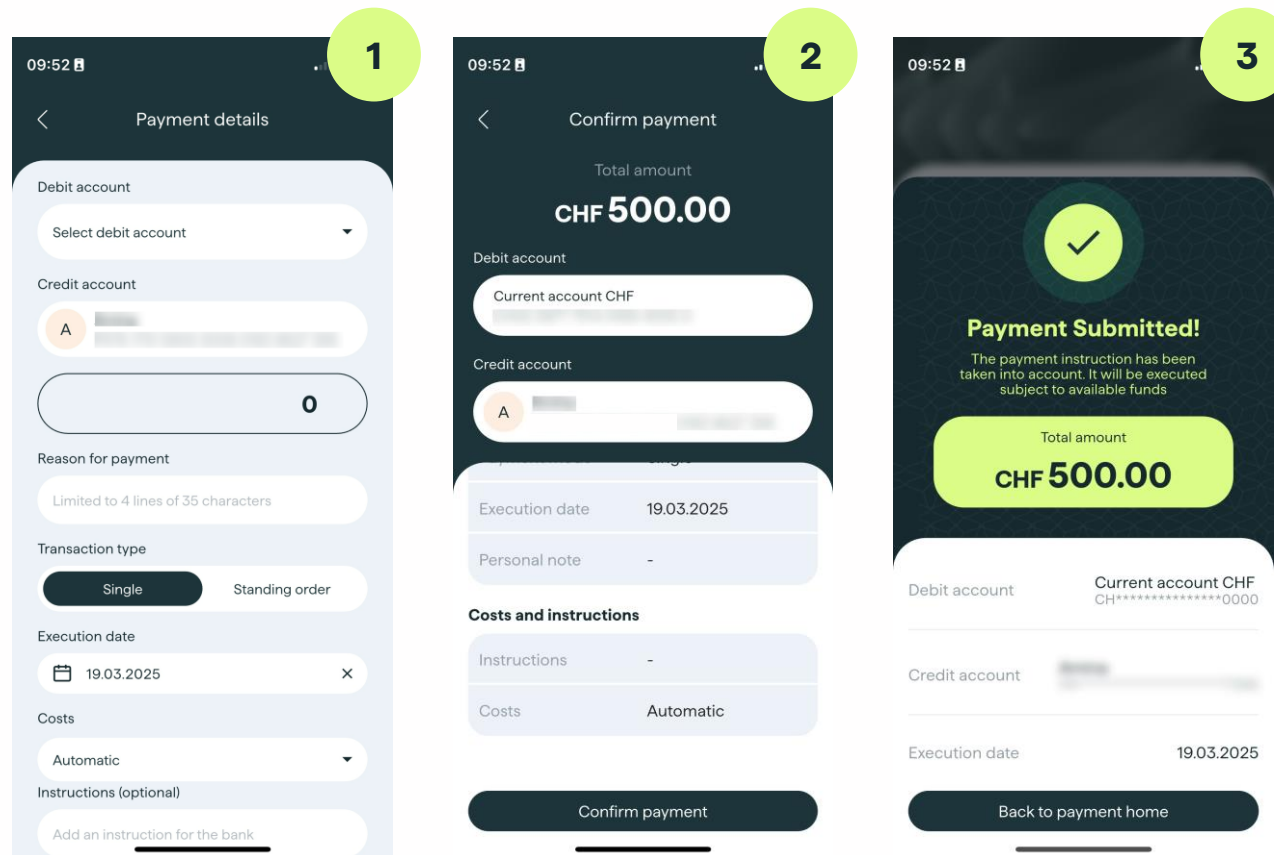
To create a new beneficiary, click on the bottom of the page "+ Pay a new beneficiary".

Two types of beneficiaries:



Pay with the application – Existing beneficiary

1. Select the debit account from the existing accounts and complete the required information.
2. Verify the entered information and confirm the payment.
3. Close the submitted payment confirmation window.



The image displays three sequential screenshots of a mobile application interface for making a payment, numbered 1, 2, and 3 in green circles.

Screen 1: Payment details

- Debit account: Select debit account (dropdown menu)
- Credit account: A [redacted]
- Reason for payment: 0
- Transaction type: Single (selected), Standing order
- Execution date: 19.03.2025
- Costs: Automatic
- Instructions (optional): Add an instruction for the bank

Screen 2: Confirm payment

- Total amount: CHF 500.00
- Debit account: Current account CHF [redacted]
- Credit account: A [redacted]
- Execution date: 19.03.2025
- Personal note: -
- Costs and instructions: Instructions -, Costs Automatic
- Confirm payment button

Screen 3: Payment Submitted!

- Payment Submitted! (with a green checkmark icon)
- The payment instruction has been taken into account. It will be executed subject to available funds.
- Total amount: CHF 500.00
- Debit account: Current account CHF CH*****0000
- Credit account: [redacted]
- Execution date: 19.03.2025
- Back to payment home button

Pay with the application – New Swiss beneficiary

1. Fill in the required information (some fields are pre-filled after entering the IBAN).
2. Select the debit account from the existing accounts and complete the required information.
3. Verify the entered information and confirm the payment.
4. Close the submitted payment confirmation window.

The image displays four sequential screenshots of a mobile application interface, numbered 1 through 4, illustrating the steps to make a payment to a new Swiss beneficiary.

- Screenshot 1: Add Beneficiary**
 - Fields include: IBAN / account number (with example: e.g CH77 0877 7014 XXXX XXXX X), Name (John Doe), and Address (optional) (Limited to 3 lines of 35 characters).
 - A "Next" button is at the bottom.
- Screenshot 2: Payment details**
 - Fields include: Debit account (Select debit account), Credit account (JD John Doe), Currency (CHF), Reason for payment (Limited to 4 lines of 35 characters), Transaction type (Single or Standing order), Execution date (19.03.2025), and Personal note (Add a personal note).
 - A "Pay 0" button is at the bottom.
- Screenshot 3: Confirm payment**
 - Fields include: Total amount (CHF 5.00), Debit account (Current account CHF), Credit account (JD), Reason for payment (-), Payment type (Payment in Switzerland (CHF)), Payment mode (Single), Execution date (19.03.2025), and Personal note (-).
 - A "Confirm payment" button is at the bottom.
- Screenshot 4: Payment Submitted!**
 - Fields include: Total amount (CHF 5.00), Debit account (Current account CHF CH*****0000), Credit account (John Doe), and Execution date (19.03.2025).
 - A "Back to payment home" button is at the bottom.

Pay with the web – New Swiss beneficiary

Click on **"Pay a new beneficiary,"** then choose **"Swiss payment."**

Fill in the required information (some fields are pre-filled after entering the IBAN).

Verify the entered information and then confirm the payment.

Validate the pending payment and the addition of the beneficiary from your mobile.

Internal Piguet Galland transfers

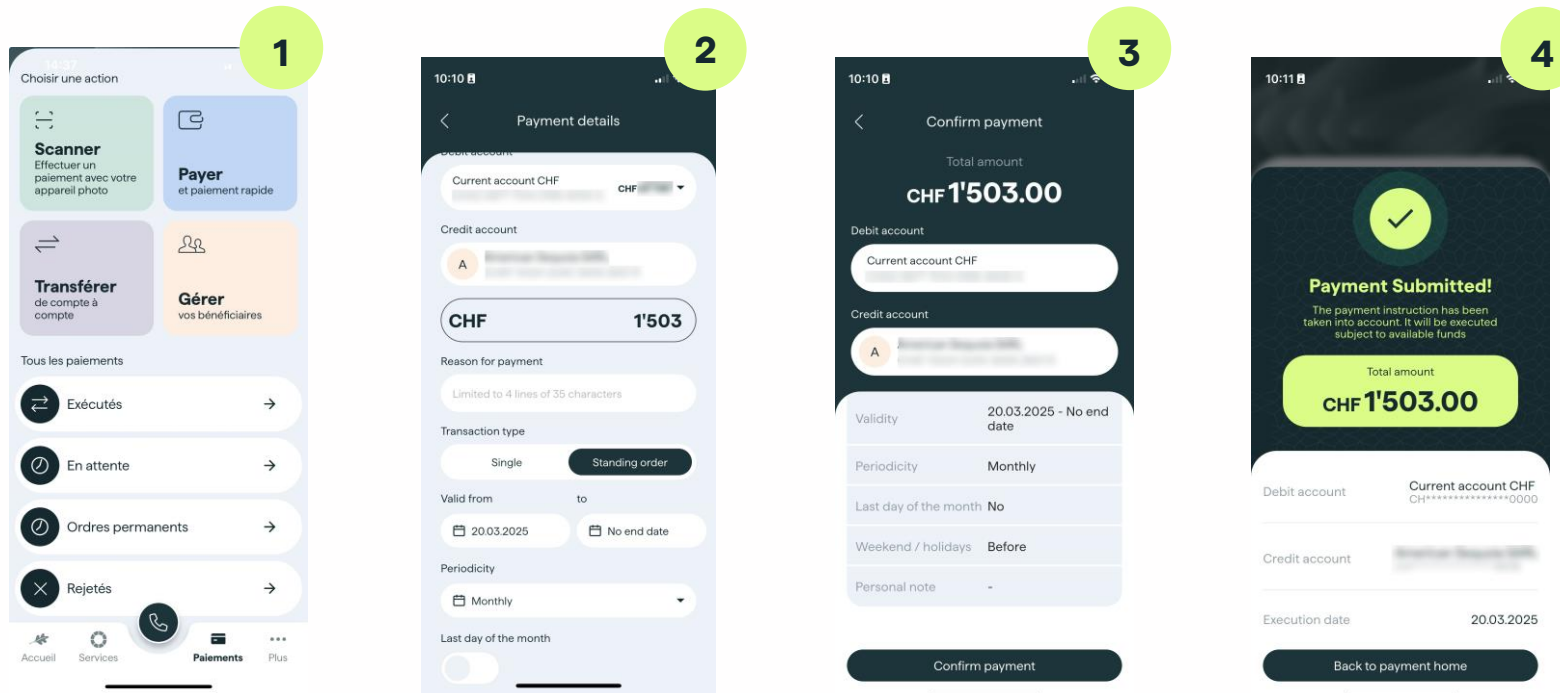
From this menu, initiate transfers between your various Piguet Galland accounts. Multi-currency transfers are possible.

The first screenshot shows the 'Take action' menu with four options: Scan, Pay, Transfer, and Manage Beneficiaries. The 'Transfer' option is highlighted with a red arrow pointing to the second screenshot.

The second screenshot shows the 'Internal transfer' form with the following fields:

- Debit account: Select debit account
- Credit account: Select credit account
- Amount: 0
- Reason for payment: Limited to 4 lines of 35 characters
- Transaction type: Single (selected), Standing order
- Execution date: 19.03.2025
- Instructions (optional): Add an instruction for the bank
- Personal note

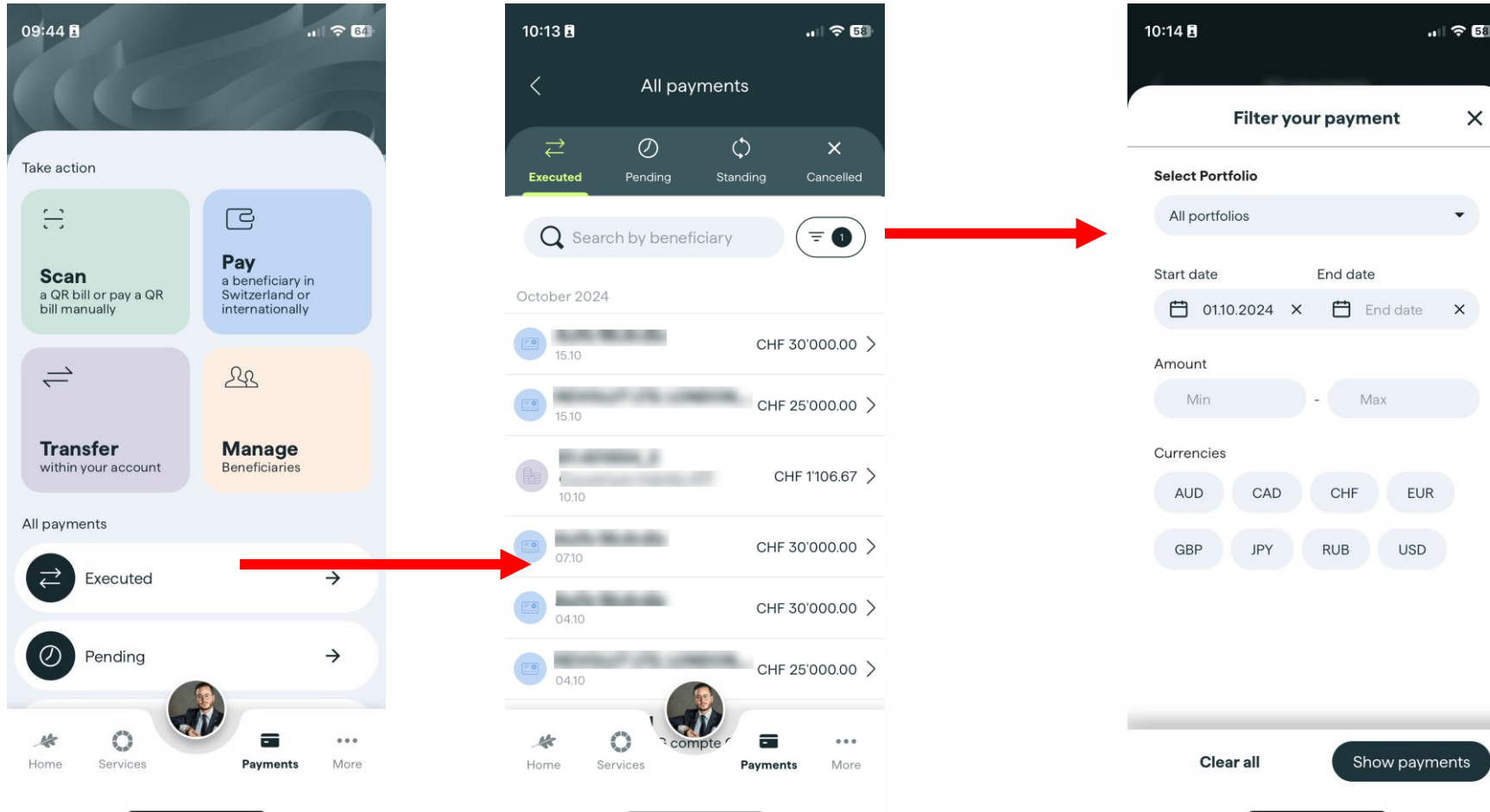
Standing Orders



1. Click on "Pay."
2. Select the debit account from the existing accounts and complete the required information.
3. Verify the entered information and confirm the payment.
4. Close the submitted payment confirmation window.
5. Find your orders in the "standing orders" section.

Filters on payments / transfers

Payment lists



A comprehensive filter with:

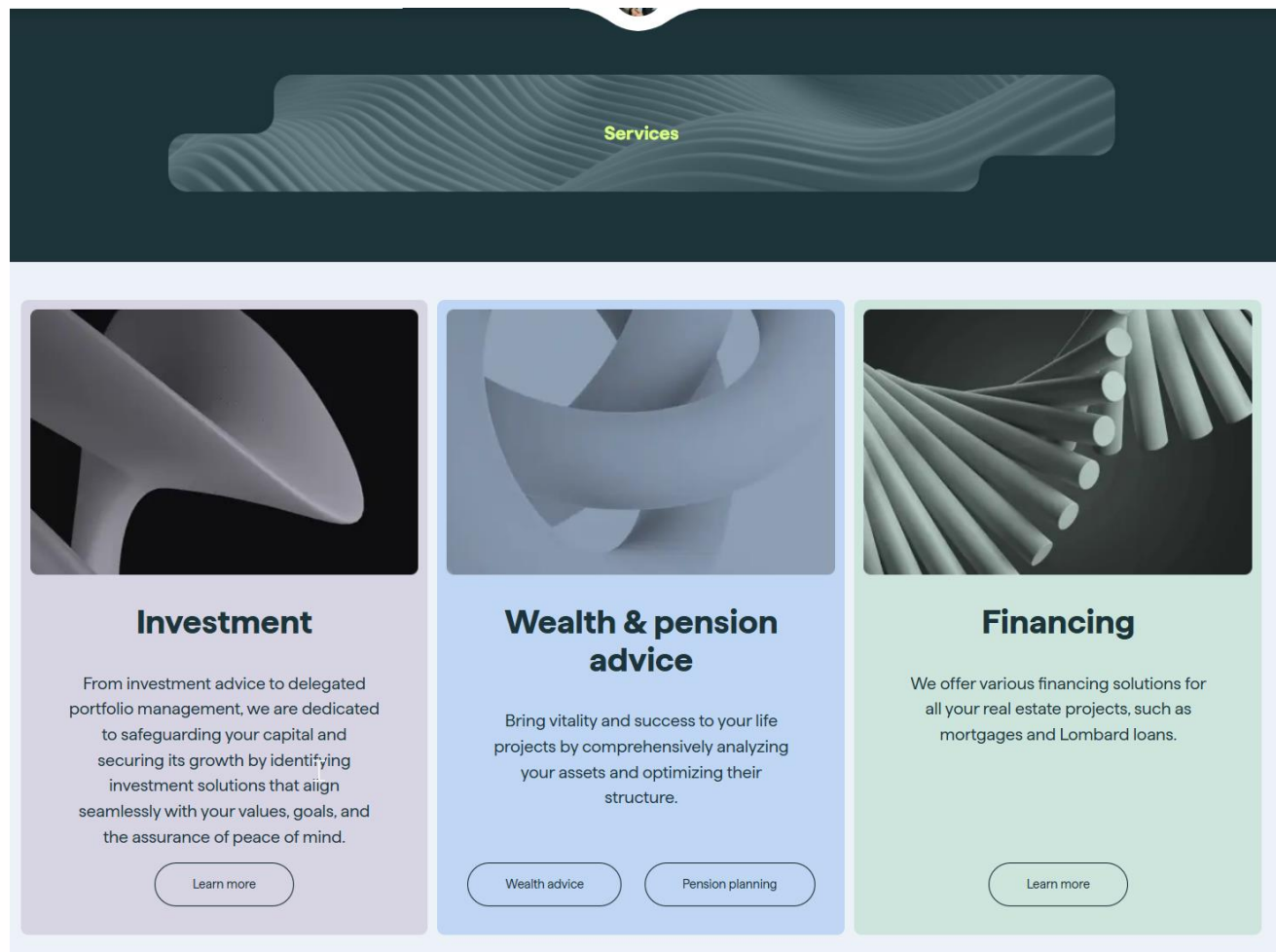
- Portfolio selection
- Period
- Amount
- Currency
- Payment type

06

Services – Documents – More

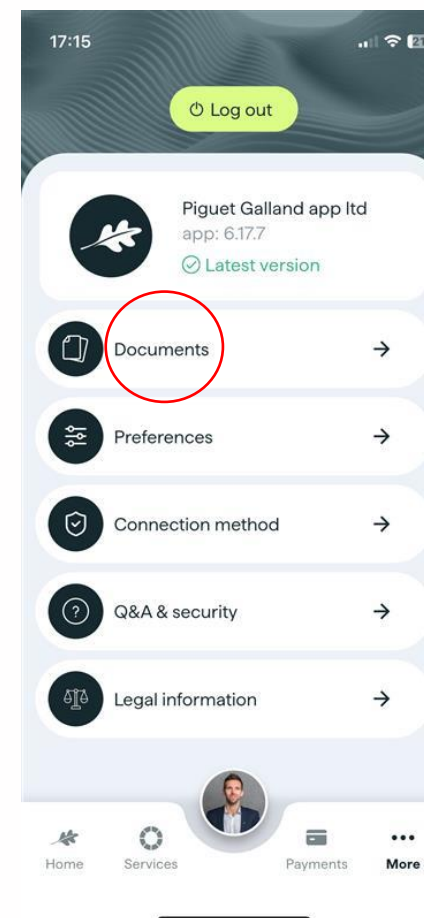
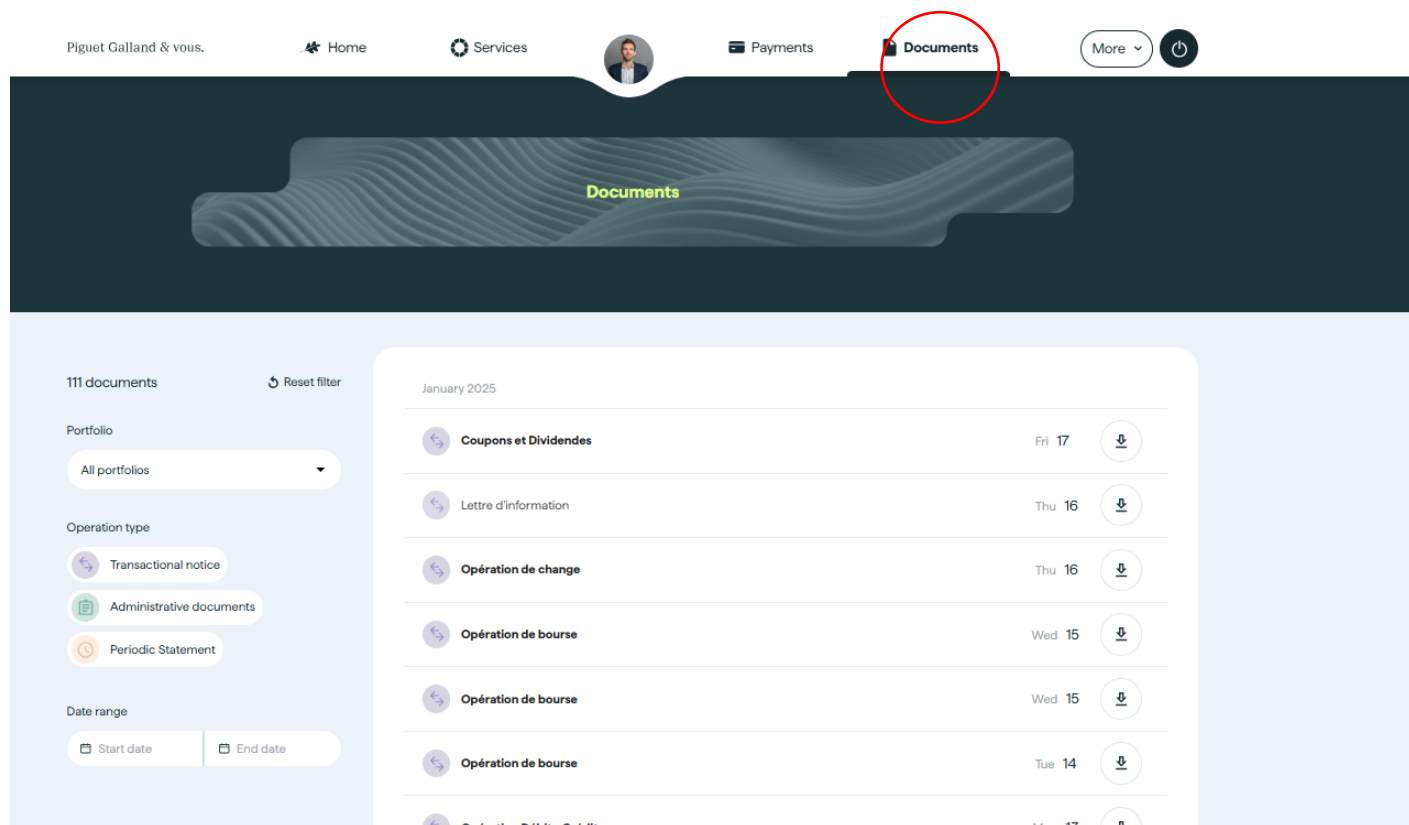
Services

The Services section provides access to the details of the three pillars of the Piguet Galland service offering on our public site.



Documents

The documents of all your portfolios are accessible from a single location.



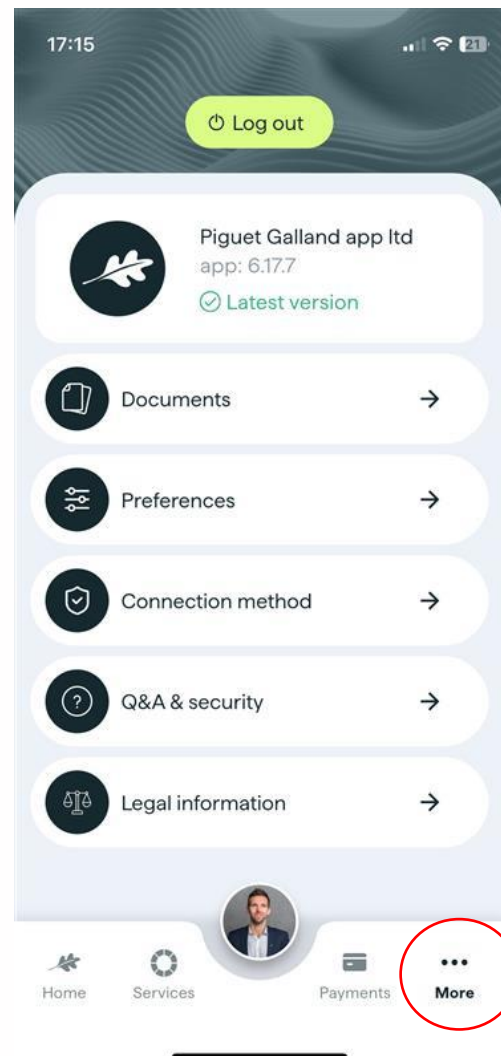
More

Via your mobile app, access to:

- All documents
- Language preferences
- PIN code modification
- Biometric activation/deactivation
- FAQs and legal information.

On the web, access to:

- Language preferences
- FAQ, security, and legal information



07

Q&A

Q&A

General Information

How can I add other EB accounts on the application?

Go to the application's home page, click on the registered EB, a menu will appear. Select "Add a new account."

How do I log out of my eBanking?

You can log out by going to the "More" menu, then clicking on the "Logout" button.

Your Advisor can assist you in the following situations:

- You want to unlock your password or generate a new one.
- You want to connect with a new phone.
- You want to block your access to eBanking.
- You want to send a comment about the application.
- You notice a problem with the application.

Q&A

Payments

When can I cancel payment orders?

Go to the "Payments" menu, then "Pending", select the pending order. Click "Delete", confirm its deletion.

Wealth

What does the consolidated wealth on the main screen represent?

The portfolios for which you are the holder are taken into account in the calculation of this consolidated wealth. Loans are not taken into account.

Where can I get a detailed statement of my assets and all the positions in my portfolio?

From the detailed view of your portfolio, click on the "Report" menu. There you will find an account statement as well as the evaluation of your wealth, downloadable in PDF format.

Security

How to use eBanking safely?

Make sure you use a unique and complex password. Never share your password with anyone: your Advisor or the bank in general will never ask you for it. Store your passwords securely with a password manager.



Genève

Avenue Peschier 41
1211 Genève 3
T +41 (0)58 310 40 00

La Chaux-de-Fonds

Rue Jaquet-Droz 43
2300 La Chaux-de-Fonds
T +41 (0)58 310 45 80

Lausanne

Avenue du Théâtre 8
1005 Lausanne
T +41 (0)58 310 49 29

Neuchâtel

Faubourg du Lac 11
2000 Neuchâtel
T +41 (0)58 310 48 88

Nyon

Place Bel-Air 8
1260 Nyon
T +41 (0)58 310 47 70

Yverdon-les-Bains

Rue de la Plaine 18
1401 Yverdon-les-Bains
T +41 (0)58 310 45 11

A votre service.

[piguetgalland.ch](https://www.piguetgalland.ch)



Ce document est publié par PIGUET GALLAND & Cie SA. Il n'est pas destiné à la distribution aux personnes physiques ou morales relevant d'une juridiction dont les lois et/ou réglementations applicables leur interdisent l'accès à de telles informations du fait de leur nationalité ou de leur domicile. Les informations ou données présentées dans ce document ne doivent pas être considérées comme une offre, une sollicitation ou un conseil en investissement. Elles ne doivent pas non plus être considérées comme un conseil pour des questions économiques, juridiques ou fiscales. PIGUET GALLAND & Cie SA ne saurait garantir l'exactitude, la fiabilité, l'actualité ou l'exhaustivité des données réunies dans cette publication, ni explicitement, ni implicitement.

En outre, tout avis ou opinion y figurant est susceptible d'être modifié sans préavis. Les décisions d'investissement basées sur les informations contenues dans ce document relèvent de la seule responsabilité de l'investisseur. Avant de considérer une transaction d'achat dans des instruments de placement, chaque investisseur doit lire et étudier soigneusement les prospectus ou autres documents légaux y afférents, ainsi que la brochure de l'ASB relative aux risques particuliers dans le négoce de titres. Toute décision d'investissement doit également reposer sur l'expérience personnelle de l'investisseur et, le cas échéant, sur un conseil spécifique de spécialistes confirmés.

Les performances passées publiées dans ce document ne sauraient préjuger ou constituer une garantie des résultats futurs. La valeur et les revenus tirés des titres ou des instruments financiers peuvent fluctuer à la hausse ou à la baisse. Il est possible que les investisseurs ne récupèrent pas la totalité du montant initialement investi; les pertes subies peuvent représenter la totalité du capital investi, voire le dépasser. Les données relatives à la performance n'incluent ni les commissions, ni les frais prélevés lors des souscriptions ou des rachats de parts. PIGUET GALLAND & Cie SA décline expressément toute responsabilité provenant d'erreurs ou d'omissions dans cette présentation. La reproduction intégrale ou partielle du présent document sans l'accord préalable écrit de PIGUET GALLAND & Cie SA est interdite.