



PARTNERS PORTAL

User Manual

PARTNERS PORTAL OVERVIEW

www.tier1fx.com



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ONBOARDING CLIENTS - OVERVIEW

- **Step 1:** Client [registers](#) via the your registration link, has their account opened under your program and receives an approval email, explaining the next steps;
- **Step 2:** Client [funds](#) their account;
- **Step 3 ([Managed Clients Only](#)):** Client joins the managed program by electronically signing the Limited Power of Attorney via “Join Program” in “My Accounts section.



STEP 1: THE ONLINE REGISTRATION

The online registration consist of 3 steps:

- Short Registration – where client can select account preferences;



Sign Up - Step 1

Choose Language
Please Select

Trading Account
Managed Account

Individual
Joint
Corporate
Trust

Preferred Language *
Please Select

Which account are you signing up for? *
Please Select

Account Type *
Please Select

I speak English

First Name *
Last Name *
Country *
Please Select

Email Address *
Confirm Email Address *
Telephone Number * Country Code + Number

Continue - Step 2

- Application Form – the actual KYC application form;
- Agreements & Acknowledgements – where client can sign our Customer Agreement and other acknowledgments and disclaimers online.

Once client completes the online application form:

1. They are redirected to Client Portal login page;
2. They receive an email with instructions on how to continue, i.e. client needs to login to Client Portal, navigate to “Documents” section and upload their documents.

Documents:

When client uploads a document, the document’s status would change from Missing Documents to Pending Verification:

Clients : John Smith · Client Documents

John Smith
0010009

Client Funding SOURCES

Client Accounts

Client Documents

Client Activity

Trader Documents

Document	Status
Personal Identification	Missing Documents
Proof of Residence	Missing Documents

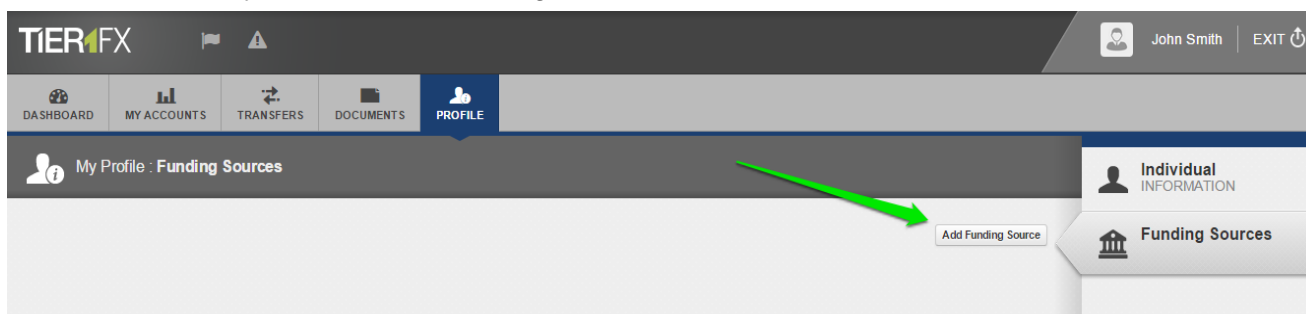
Misc Documents

Upload Document

STEP 2: FUNDING

Clients can fund their account following these steps:

- 1. They need to “Add Funding Source” in the “Profile” section of Client Portal.



- 2. Deposit

Once a funding source has been added, client can navigate to Transfers>Fund Account and proceed with the deposit:

“From Account” – they can choose between the Funding Sources they have added;

“To Account” – they can choose between the landing accounts they have in each currency;

“Broker Receiving Account” – depending on the currency of the landing account they have selected, system will display the available options – in the case of bank wire for example, they will be able to choose between our depository banks.

When client clicks “**Submit**”, they will receive an email with bank wire funding instructions.

- 3. Once funds are credited to their Landing Accounts, clients need to transfer them to their trading/managed accounts. They can do so in the “**Internal Transfers**” section on the screenshot above.

Detailed instructions are provided in the Client Portal Guide, available under Broker Forms and under the FAQ sections at www.tier1fx.com.



STEP 3: JOINING A MANAGED PROGRAM

Once account is funded, client navigates to “My Accounts”, clicks on their Managed Account and then clicks the “Join Program” button at the bottom of the page:

Account Name	Balance	Credit	Floating P/L	Equity	Margin	Leverage
[account name] Rename Account	0.00	0.00	0.00	0.00	N/A	00:00

Quick Reports	
Account Statement	Download
Deposits / Withdraws	Download
Summary	Download

Net Change		
Absolute	Monthly	Daily
N/A	N/A	N/A

Recent Transactions

No Recent Transactions

Account Program

No Managed Account Programs have been selected.

[Join Program](#)

Signing the Limited POA and Compensation Acknowledgement:

When client clicks “Join Program”, the following pop-up window is displayed:

Join Program *Required Fields

Select Program *

Limited Power of Attorney and Compensation Acknowledgement

Limited Power of Attorney
The undersigned Account Holder hereby appoints and authorizes the individual/entity identified in the space below as the “Authorized Trader” (“Trader”) on the Account to trade Spot foreign exchange contracts, precious metal contracts, futures, options, derivatives and/or CFDs (“Instruments”) on margin for the sole risk of the Account. I indemnify and hold harmless T1 for any and all losses, indebtedness, costs and expenses and all other liabilities that arise in connection, directly or indirectly, with the Trader’s activity in the Account.

I have read and agree to the Limited Power of Attorney. *

The Electronic Signature eliminates paper use and expedites the overall application process. To submit an electronic signature, simply type your name into the “Enter Electronic Signature” text field and click

“Confirm Signature.”

Enter Electronic Signature *

type your full name here [Confirm Signature](#)

Enter Password *

Enter password to submit request.

[Cancel](#) [Join](#)



Under “Select Program” client will see all the Managed Programs which you offer. After he selects one, Limited Power of Attorney and Compensation Acknowledgment with the relevant conditions are displayed.

After reading them, client needs to:

- ✓ Tick “I have read and agree to the Limited Power of Attorney”
- ✓ Enter their full name, as it appears on his application, and click “Confirm Signature”
- ✓ Enter their Client Portal password
- ✓ Click “Join”

The status under Account Program will change to Pending and client will automatically join the managed program at rollover of that day.

Note: Once client joins the program, the “Join Program” button changes to “**Leave Program**” and acts as revocation of LPOA.

Note: Client can refer to the LPOA conditions at any time: it will appear on the right-hand side of the page, once they join the program.



PARTNERS PORTAL OVERVIEW

Note: If you, as a Tier1FX Partner also have a trading account, you will have two separate T1 profiles:

- Client Portal login, containing your personal trading accounts; and
- Partners' profile, containing your clients' database and accounts.

Partners' Portal is in many ways similar to the standard Client Portal, with a few added features.

1. **Dashboard** section displays information on your clients' activity (trades, registrations statuses and more).

DASHBOARD
MY ACCOUNTS
TRANSFERS
DOCUMENTS
MY CLIENTS
PROFILE

My Accounts

Account Number	Equity	Change
EUR		
200-001-0010001	0.00	N/A
200-002-0010001	0.00	N/A

Recent Activity

My Activity ▾

Date/Time	Activity Details
15/07/2015 10:08:27	Ad IG.png has been approved and can now be enabled.
15/07/2015 10:08:02	Ad IG.png has been uploaded and is pending approval.
05/06/2015 14:56:53	Managed Account Program Test - [] has been approved and can now be enabled.
05/06/2015 14:56:14	Your request for Managed Account Program Test - [] has been denied.
05/06/2015	Your request for Managed Account Program Test - [] has been denied.

Latest Client Changes

Missing Documents 0	Pending Verification 0	Pending Approval 0	Recently Approved 1	Approval Denied 0	Active Account 0	Inactive Account 0	Dormant Account 0
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Client Transactions

Deposits ▾

Date/Time	Client	Status	Amount
08/07/2015 15:02:46	200-000-0010009 Test - Jane Test - Smith	Canceled	10.0
11/06/2015 10:34:32	200-000-0010009 Test - Jane Test - Smith	Approved	1.1
11/06/2015 10:14:00	300-000-0010009 Test - Jane Test - Smith	Approved	1.1
11/06/2015 09:49:34	200-000-0010009 Test - Jane Test - Smith	Approved	1.1
11/06/2015	200-000-0010009	Approved	

Volume Overview

Currencies ▾

Month to Date: 0

Market News

Time	Currency	Details	Impact
17/07/2015 00:00:00	AUD	CB Leading Index m/m	▲
17/07/2015 12:30:00	USD	Building Permits	▲
17/07/2015 12:30:00	USD	Housing Starts	▲
17/07/2015 12:30:00	USD	Core CPI m/m	▲

Broker Promo

2. Your “Fee/Rebate Account”, under “My Accounts” section

Here you will see all your rebates, applied daily at rollover.

The screenshot shows the TIER1FX user interface. The top navigation bar includes 'DASHBOARD', 'MY ACCOUNTS', 'TRANSFERS', 'DOCUMENTS', 'MY CLIENTS', and 'PROFILE'. The 'MY ACCOUNTS' section is active, displaying 'My Accounts : Accounts List'. Below this, there is a summary for a '200-000- EUR Landing Account' with a balance of 0.00. A table below lists the account details:

Type	Account *	Balance	Floating P/L	Equity	Latest Change
	200-00 Fee/Rebate Account	--	--	0.00	--

3. Withdrawing Your Commissions

- Step 1: Add your bank account details under **Banking Information** in the Profile section.

This is a one-time step, you only need to add this information once.

- Step 2: Transfer the desired amount from your Fee Account to your **Landing Account** (Internal Transfer tab under Transfers section)
- Step 3: Submit a withdrawal request through the **Withdraw Funds** tab under Transfers section

The screenshot shows the 'Transfers : Withdraw Funds' form in the TIER1FX interface. The 'TRANSFERS' tab is active. The form includes the following fields:

- From Landing Account ***: A dropdown menu with the text 'Please select a landing account'.
- To Bank Account ***: A dropdown menu with the text 'Please select a bank account'.
- Amount ***: A text input field with the placeholder 'enter amount'.
- Notes**: A large text area for additional information.
- Submit**: A blue button at the bottom left.

On the right side, there is a sidebar with three tabs: 'Internal Transfer', 'Withdraw Funds' (highlighted with a green box), and 'Transaction History'. A 'Helpful Tip' box is also visible, providing information about outgoing wire fees and processing times.



3. Profile

DASHBOARD MY ACCOUNTS TRANSFERS DOCUMENTS MY CLIENTS **PROFILE**

My Profile: Personal/Contact Information

Personal Information [Edit](#)

	Title Mr.	First Name 	Middle Name 	Last Name
	Date of Birth 	Gender Male		
	Citizenship 	ID Information Government ID: 333554454		
	Country of Residence Malta	Language Spanish	Speaks English Yes	
	Employment Status Self-Employed	Employment Industry finance	Occupation 	
	Account Number: 0010001	Phone ID 	Password <input type="password"/>	Change Password

Personal/Contact INFORMATION

Banking INFORMATION

Fee Group MANAGEMENT

Managed Account PROGRAMS

Marketing TOOLS

Contact Information [Edit](#)

Residential Address
my home

City

Country
Malta

Postal Code

Time At Current Address
4 years, 0 months

Previous Address

City

Country

Postal Code

Telephone Number
356-9999999

Mobile Number
356-999999

Email Address

Alternate Email

Email Notification Preferences

Email Type	Receive	Do Not Receive
Marketing Emails	<input checked="" type="radio"/>	<input type="radio"/>

Fee Group and **Managed Account Programs** contain information on the different commission groups and managed programs you offer; **Marketing Tools** contains your online registration links and any other marketing material



4. "My Clients" section contains your clients and their accounts.

You can choose whether to display a list of your Clients or a list of all clients' Accounts from the right-hand side dropdown menu.

Clicking on a client/account will display further information, such as client's documents, trades, personal details etc.

My Clients

Clients List Clients List ▾

Activity	Account ID	First Name	Last Name	Company Name	Status
<input type="radio"/>	0010009	Test - Jane	Test - Smith	N/A	Approved

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