

Set Up a Standing Instruction

StashAway



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## How to set up dollar-cost-averaging (DCA) plan with StashAway

There's no minimum deposit or require any minimum balance. All without additional transfer fee. However, we advise you to deposit at least 200 THB each time so that we are able to allocate your funds to purchase all the securities in your portfolio. Setting up a recurring transfer (DCA) with StashAway can be done in the following steps:

### 1. Set up a Monthly Deposit Plan in StashAway app

If you wish to set up or update your monthly deposit amount, kindly update your Monthly Deposit Plan in StashAway app before setting up recurring transfer on your Mobile Banking app. Setting up Monthly Deposit Plan in StashAway app can be done in the following steps:

1. Login to your StashAway account
2. Click "Transfer" icon at the top right corner > select "Put money in"
3. Select "Set up Monthly deposit"
4. Indicate the amount to each portfolio or click "Edit" to indicate your preferred amount
5. Click "Continue" to save your Monthly deposit plan and then click "Done"

### 2. Set up a recurring transfer on your Mobile Banking platform

If you wish to invest in more than one portfolio. Kindly set up the total amount of all portfolios. For example, if you indicated 1,000 THB to portfolio A and 2,000 THB to portfolio B, kindly set up a transfer of 3,000 THB on your Mobile Banking app. The system will allocate your funds as per your indicated plans.

## Select your preferred bank

Recurring transfer function is available in the following Mobile Banking apps.



Note: Make sure your deposit comes from a bank account that is in your name. The system will verify the name that matches your legal name to proceed. We will reverse any deposits that come from a bank account that is not under your name.

### StashAway's bank account for client

StashAway Asset Management (Thailand) Co., Ltd.

Bank: Citibank

Account name: StashAway Asset Management

Account number: 0-128492-046





## Bank Transfer Scheduling Guide

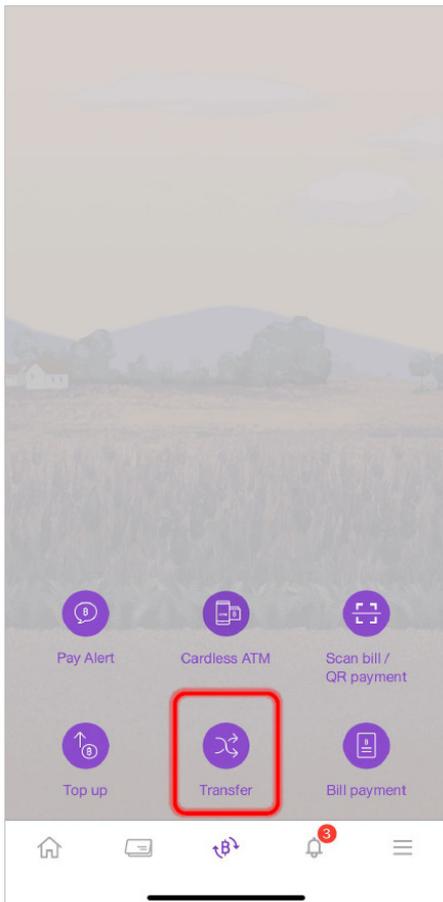
**Step 1:** Log in to SCB EASY application > select “Transfer”.

**Step 2:** Select an account for the transaction > Select “Citibank” as the recipient bank.

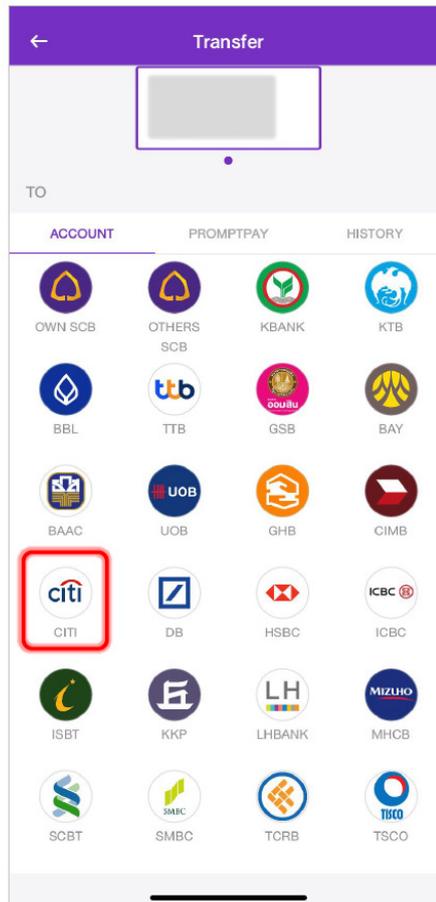
**Step 3:** Enter the recipient’s account number and transfer amount > Click at “Set a schedule”.

### Recipient’s bank account details

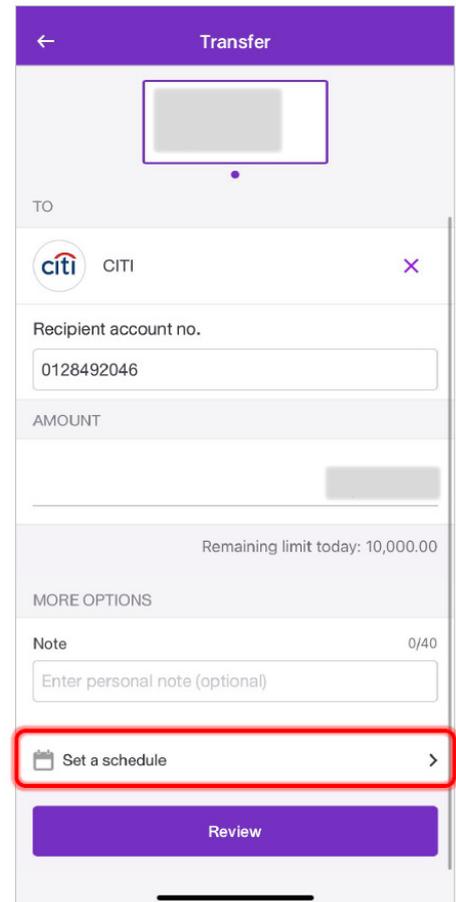
Bank: Citibank  
 Account number: 0-128492-046  
 Account name: StashAway Asset Management



(1)



(2)



(3)



## Bank Transfer Scheduling Guide

**Step 4:** Select “Monthly” > Enter the schedule details (dates and frequency) > then press “OK”.

**Step 5:** Click “Review” to review your scheduled transfer details.

**Step 6:** Review your scheduled transfer details > click “Confirm”.

← Set a schedule

ONCE MONTHLY

Start date: 01 Nov 2021

End date: 27 Oct 2022

Make payment every: 1

You can schedule payment(s) within the next 12 months. This transaction will take place between 07:00 - 10:00 on the scheduled date.

OK

Cancel

(4)

← Transfer

FROM: [Redacted]

TO: Citi 0128492046

Recipient account no.: 0128492046

AMOUNT: [Redacted]

Transfer limit per day: 10,000.00

MORE OPTIONS

Schedule: Monthly, Every 1st of the month, From 01 Nov 2021 - 27 Oct 2022

Review

(5)

← Review schedule transfer

FROM: [Redacted]

TO: STASHAWAY ASSET MANAGEMENT (0128492046)

AMOUNT: [Redacted]

FEE: 0.00

All fees and charges are subject to change

EFFECTIVE DATE: Monthly, Every 1st of the month, From 01 Nov 2021 - 27 Oct 2022

Confirm

(6)

ธนาคารกสิกรไทย  
开泰银行 KASIKORNBANK



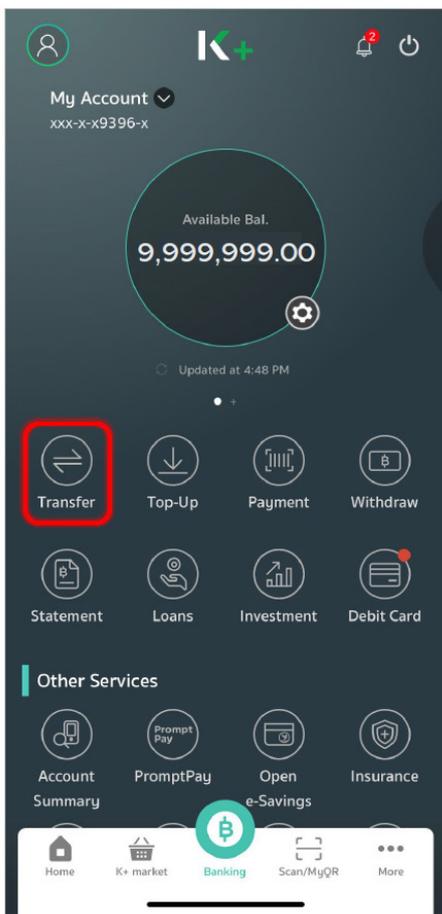


## Bank Transfer Scheduling Guide

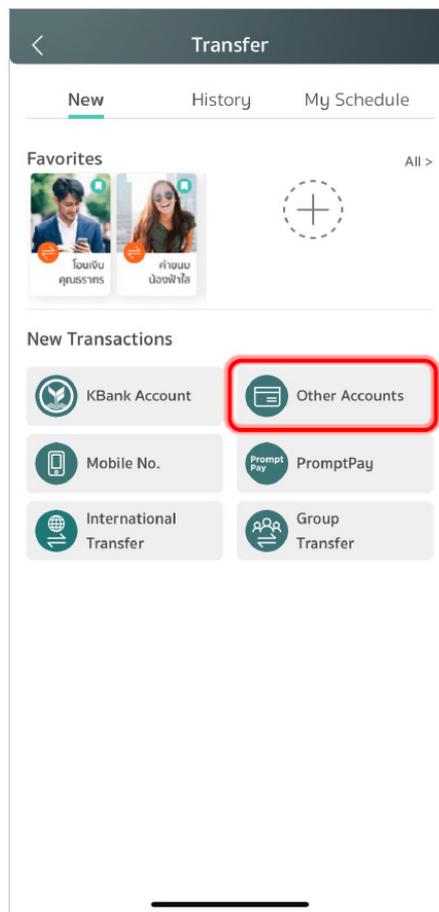
**Step 1:** Log in to K PLUS application > Click “Banking” > Enter your pin > Select “Transfer”.

**Step 2:** Select “Other Accounts”.

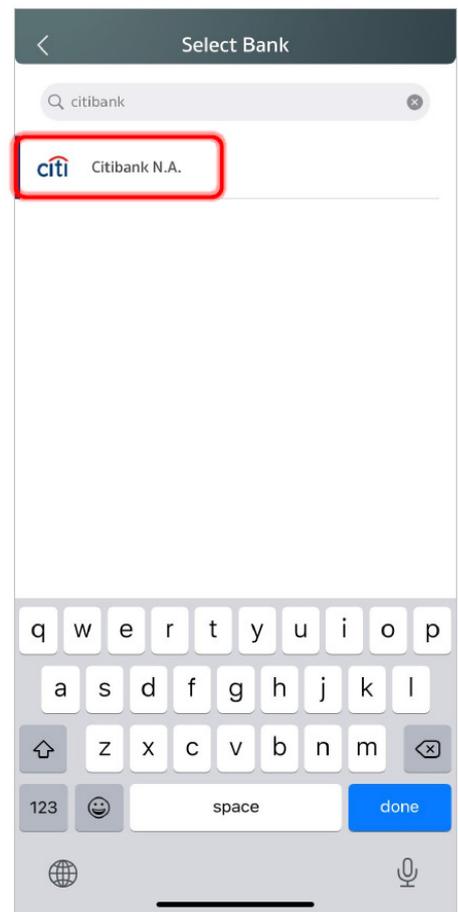
**Step 3:** Select “Citibank N.A.” as the recipient bank.



(1)



(2)



(3)



## Bank Transfer Scheduling Guide

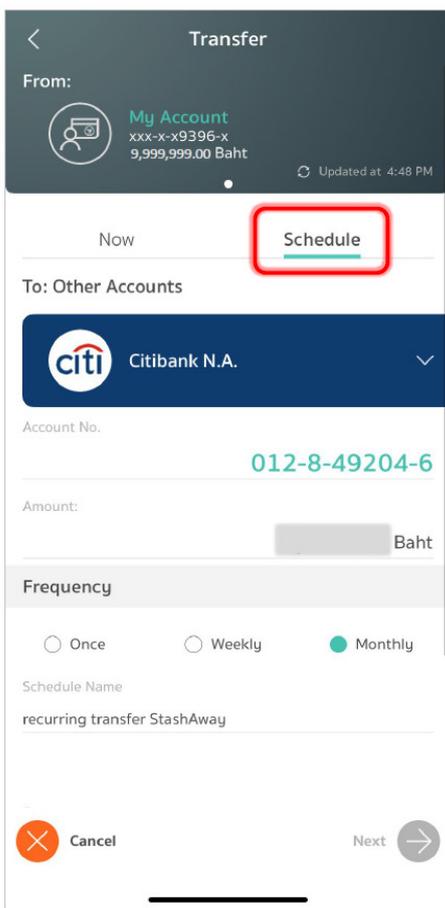
**Step 4:** Select “Schedule” > Enter the recipient’s account number and transfer amount.

**Recipient’s bank account details**

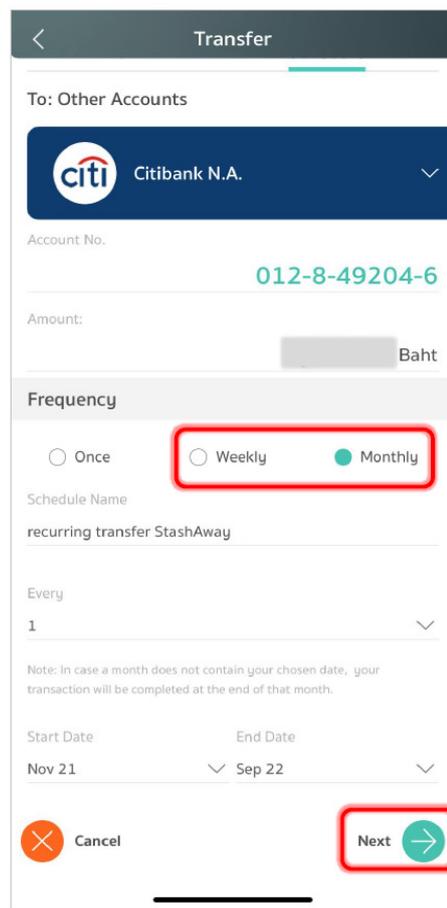
Bank: Citibank  
 Account number: 0-128492-046  
 Account name: StashAway Asset Management

**Step 5:** Select “Monthly” > enter the schedule details (dates and frequency) > then press “Next”.

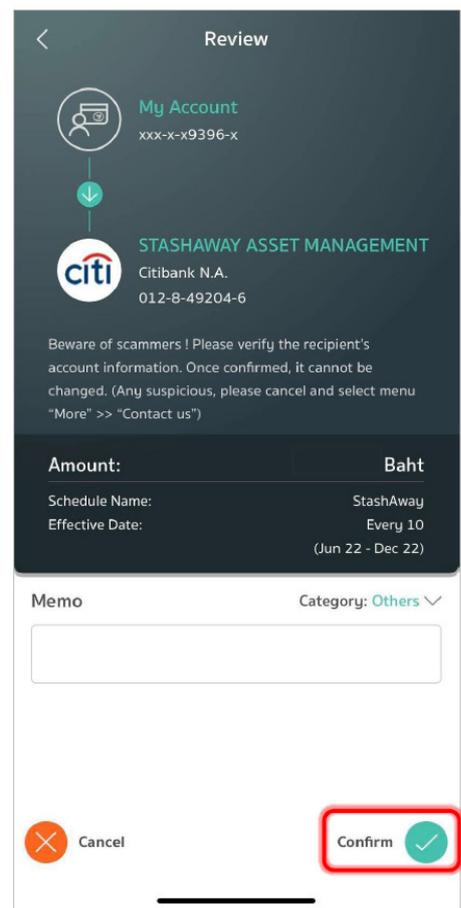
**Step 6:** Review your scheduled transfer settings > Click “Confirm”.



(4)



(5)



(6)





## Bank Transfer Scheduling Guide

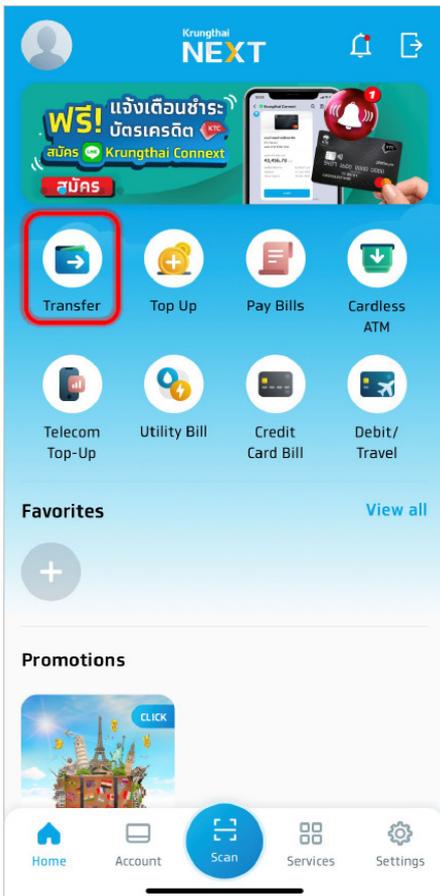
**Step 1:** Log in to Krungthai NEXT application > Select “Transfer” > Enter your pin.

**Step 2:** Select the recipient’s bank as “Other” > Select “Citibank” as the recipient bank > Enter the recipient’s account number and transfer amount.

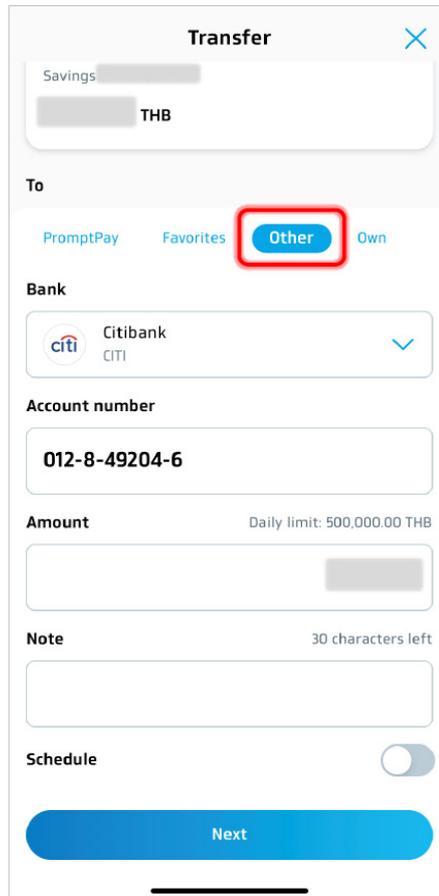
**Recipient’s bank account details**

Bank: Citibank  
 Account number: 0-128492-046  
 Account name: StashAway Asset Management

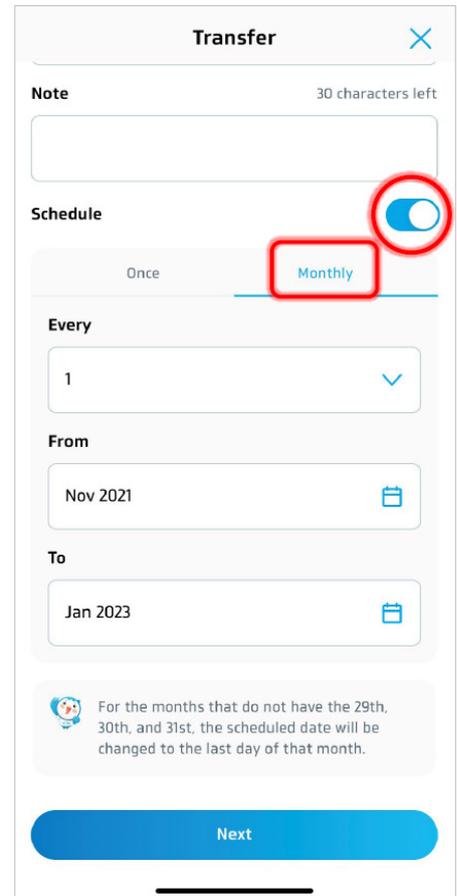
**Step 3:** Turn on “Schedule” button > Select “Monthly”.



(1)



(2)



(3)



## Bank Transfer Scheduling Guide

**Step 4:** Enter the schedule details (dates and frequency) > Press “Next”.

**Step 5:** Review your scheduled transfer details > Click “Confirm”.

**Step 6:** The transaction is completed > Click “Done”.

**Transfer**

Note 30 characters left

Schedule  Monthly

Once Monthly

Every 1

From Nov 2021

To Jan 2023

For the months that do not have the 29th, 30th, and 31st, the scheduled date will be changed to the last day of that month.

Next

(4)

**Confirm Details**

STASHAWAY ASSET MANAGEMENT  
Citibank  
012-8-49204-6

Amount [redacted] THB

Fee 0.00 THB

Scheduled date every 1st

Start - End Nov 2021 - Jan 2023

Confirm

(5)

**Successfully Scheduled Transaction**

Ref. No. STR20211027652696

STASHAWAY ASSET MANAGEMENT  
Citibank  
XXX-X-XX204-6

Amount [redacted] THB

Fee 0.00 THB

Transaction date 27 Oct 2021 - 19:54

Scheduled date every 1st

Start - End Nov 2021 - Jan 2023

Share

Done

(6)





## Bank Transfer Scheduling Guide

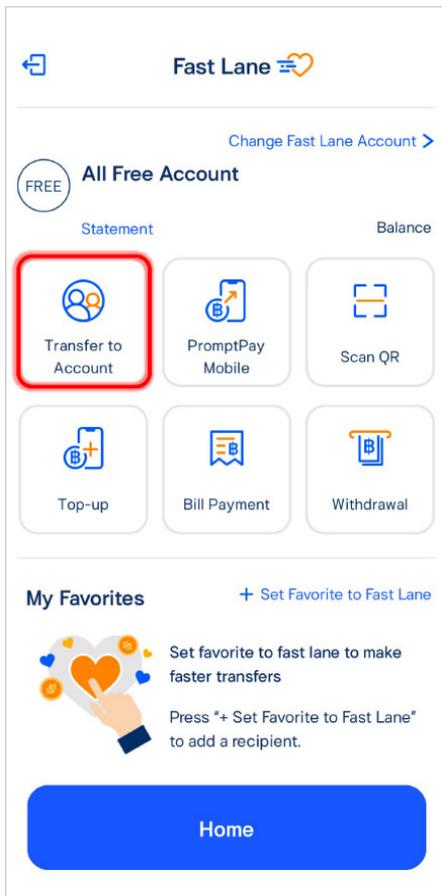
**Step 1:** Log in to ttb touch application > Select “Transfer to Account”.

**Step 2:** Select “Citibank” as the recipient bank > Enter the recipient’s account number and transfer amount.

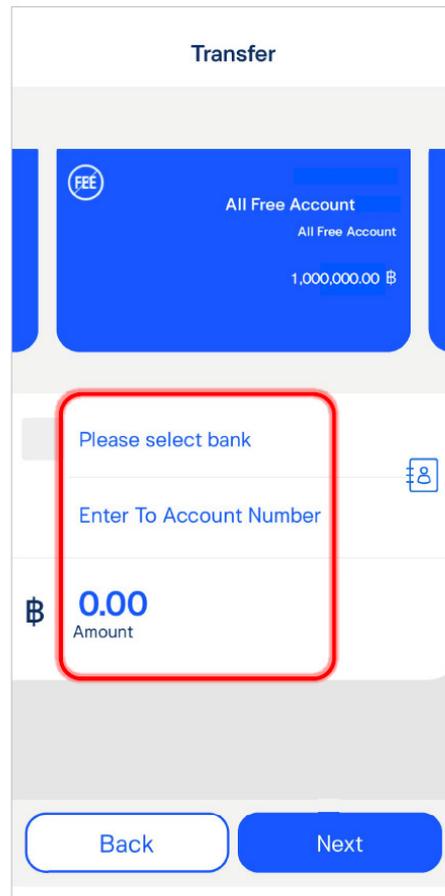
### Recipient’s bank account details

Bank: Citibank  
 Account number: 0-128492-046  
 Account name: StashAway Asset Management

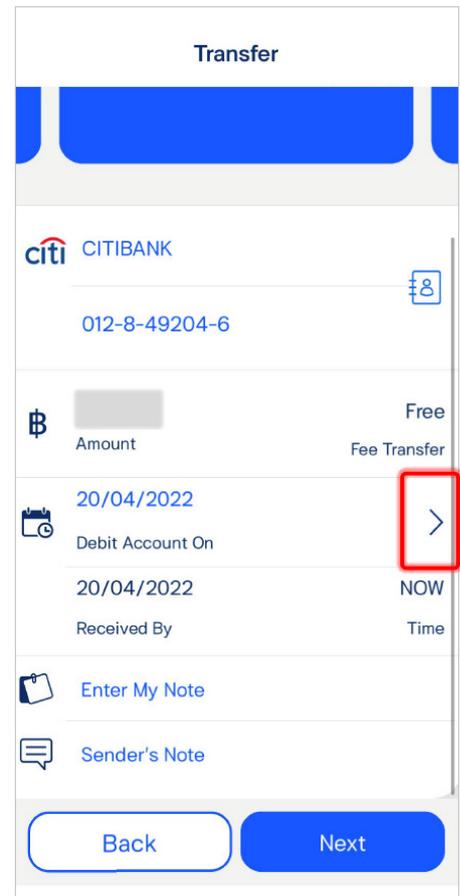
**Step 3:** Select the arrow icon near “Debit Account On” to indicate the transfer date.



(1)



(2)



(3)



## Bank Transfer Scheduling Guide

**Step 4:** Enter the schedule details (dates and frequency) > Select “Monthly” > Click “Save”.

**Step 5:** Review transaction details > Click “Next”.

**Step 6:** Review your scheduled transfer details > Click “Confirm”.

(4)

(5)

Schedule Details	
Amount (Fee)	Reference No.
Start Debit On	Ending On
Repeat As	Execute
01/05/2022	01/05/2023
Monthly	13 Times

(6)





## Bank Transfer Scheduling Guide

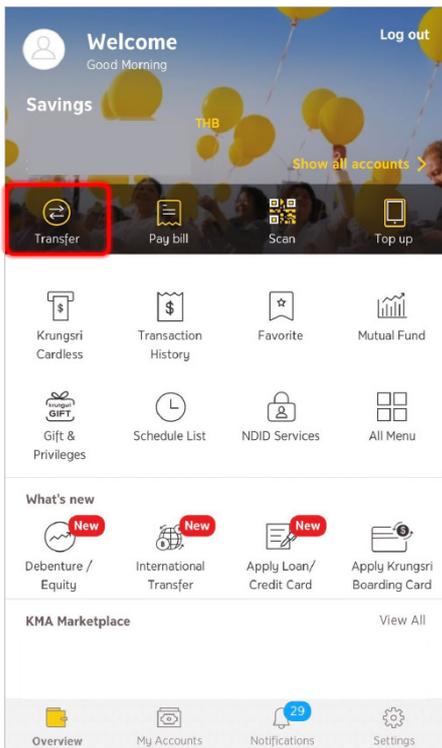
**Step 1:** Log in to Krungsri Mobile App application > Select “Transfer”.

**Step 2:** Select transfer to “Other” > Select “Citibank” as the recipient bank > Enter the recipient’s account number and transfer amount > Tab “Next”.

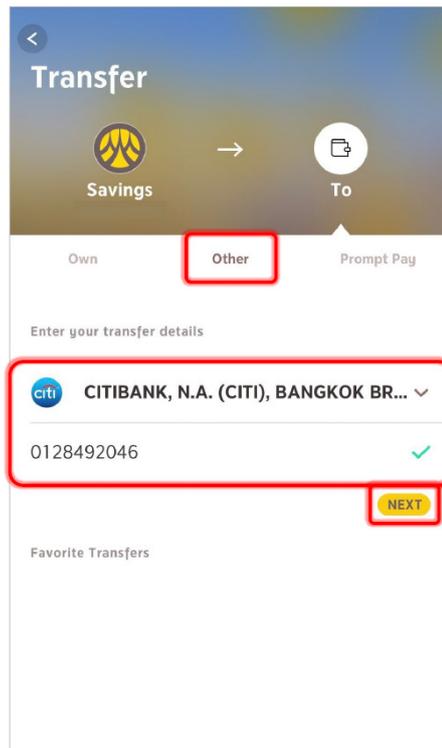
**Recipient’s bank account details**

Bank: Citibank  
 Account number: 0-128492-046  
 Account name: StashAway Asset Management

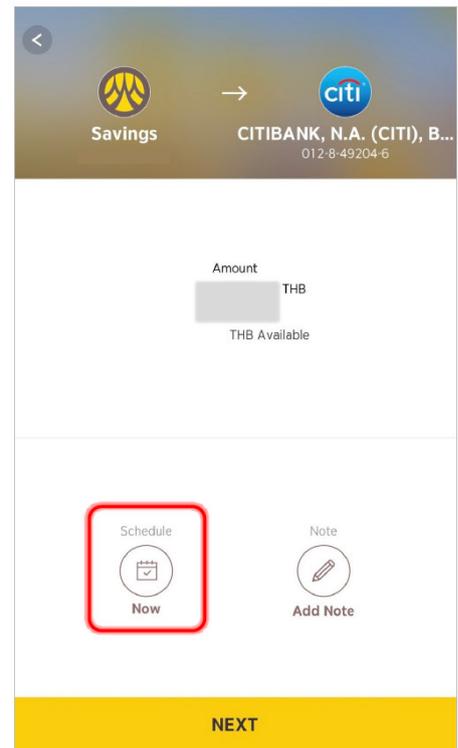
**Step 3:** Select “Schedule Now” to set up recurring transfers.



(1)



(2)



(3)



## Bank Transfer Scheduling Guide

**Step 4:** Select “Monthly” > Enter the schedule details (dates and frequency) > Click “Save”.

**Step 5:** Review transaction details > Click “Next”.

**Step 6:** Review your scheduled transfer details > Click “Confirm”.

**Schedule**

Recurring Monthly >

Start 04 Nov 2021

End 04 Nov 2021

SAVE

(4)

Savings → CITIBANK, N.A. (CITI), B...  
012-8-49204-6

Amount THB

THB Available

Schedule Monthly  
04 Nov 2021 - 04 Nov 2021

Note Add Note

NEXT

(5)

**Confirm**

From [Redacted]

To STASHAWAY ASSET MANAGEMEN  
012-8-49204-6

Amount \$ [Redacted]  
+0.00 THB fee

Ref No. [Redacted]

Transaction Date **05 Nov 2021 20:02:56**

Schedule Type **Monthly, 04Nov 2021 - 04Nov 2021**

CONFIRM

(6)



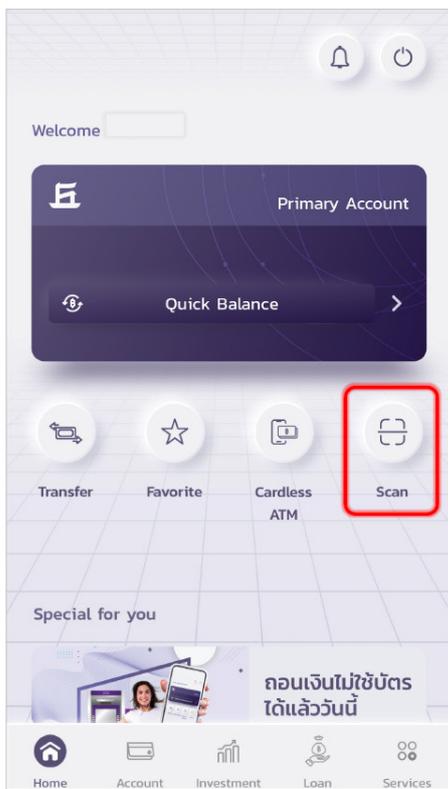


## QR Code Transfer Scheduling Guide

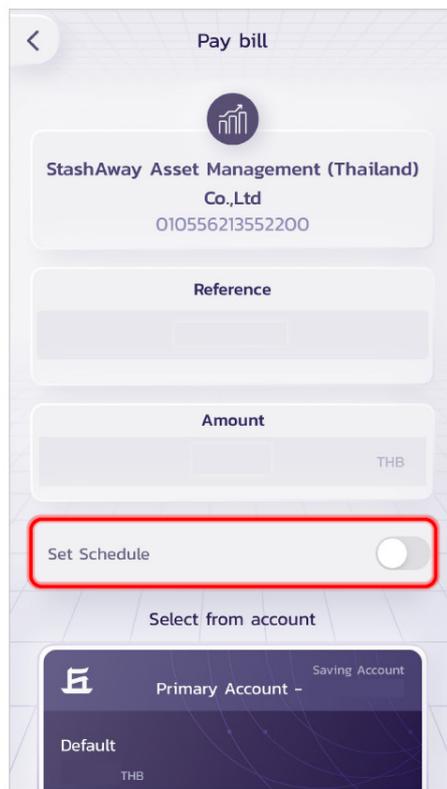
**Step 1:** Log in to KKP Mobile application > Select “Scan” to scan the saved StashAway QR code.

**Step 2:** Check your reference code and transaction amount > Click “Set Schedule”.

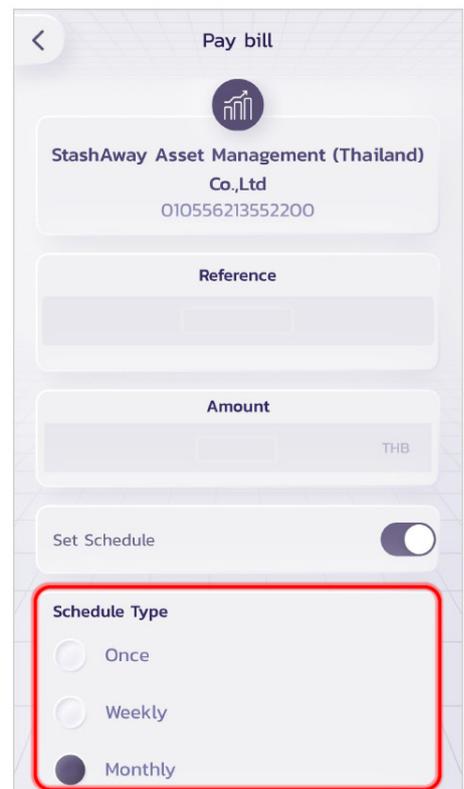
**Step 3:** Select “Monthly”.



(1)



(2)



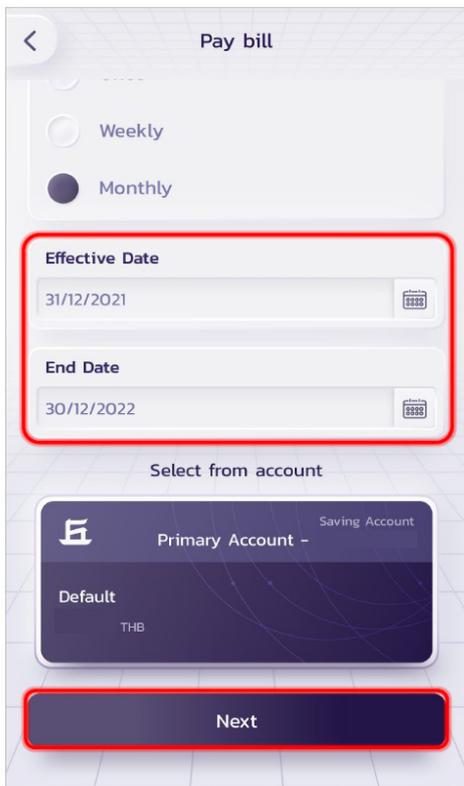
(3)



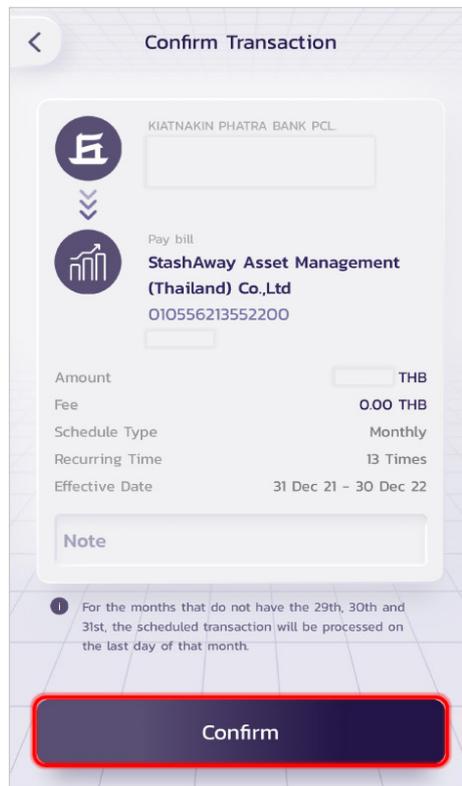
## QR Code Transfer Scheduling Guide

**Step 4:** Enter “Effective Date and End Date” > Press “Next”.

**Step 5:** Review your scheduled transfer details > Click “Confirm”.



(4)



(5)



## Bank Transfer Scheduling Guide

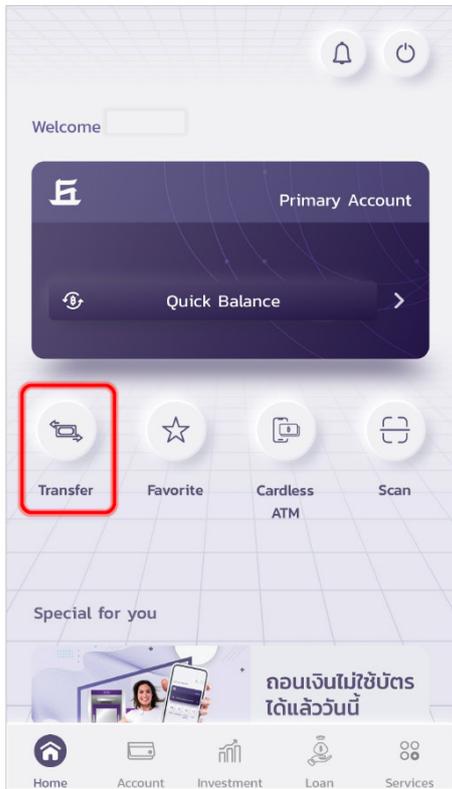
**Step 1:** Log in to KKP Mobile application > Select “Transfer”.

**Step 2:** Click “Account” > Select “Citibank” as the recipient bank.

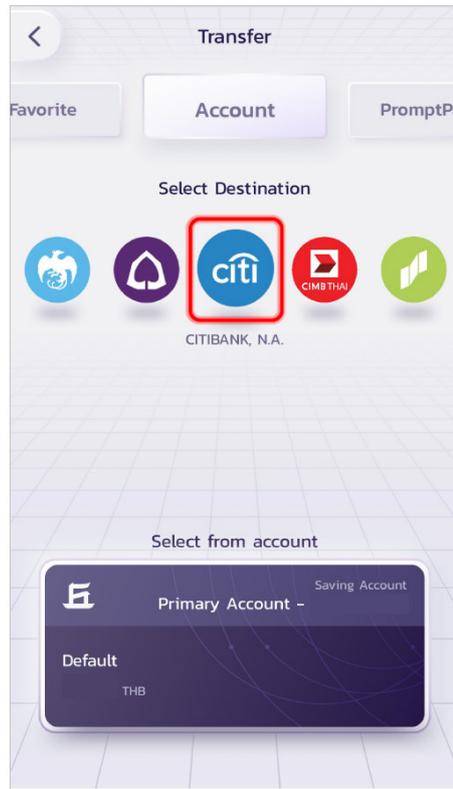
**Step 3:** Enter the recipient’s account number and transfer amount > Click “Set Schedule”.

**Recipient’s bank account details**

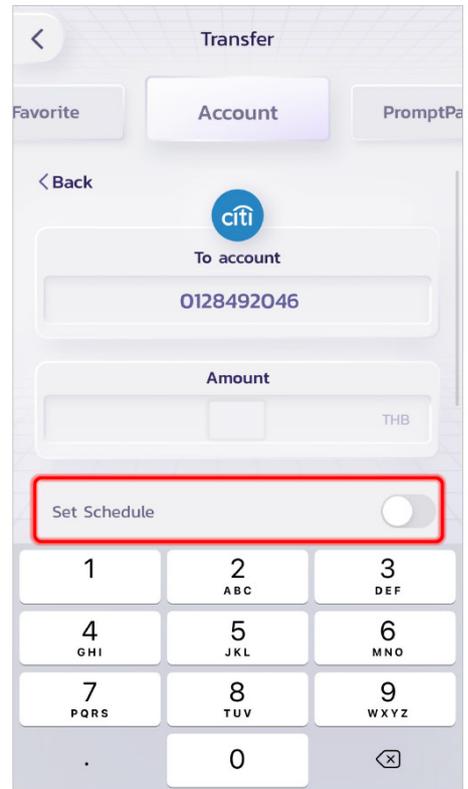
Bank: Citibank  
 Account number: 0-128492-046  
 Account name: StashAway Asset Management



(1)



(2)



(3)

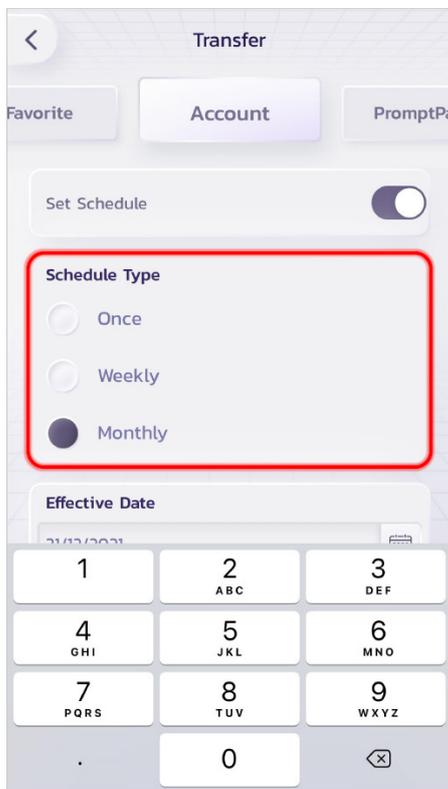


## Bank Transfer Scheduling Guide

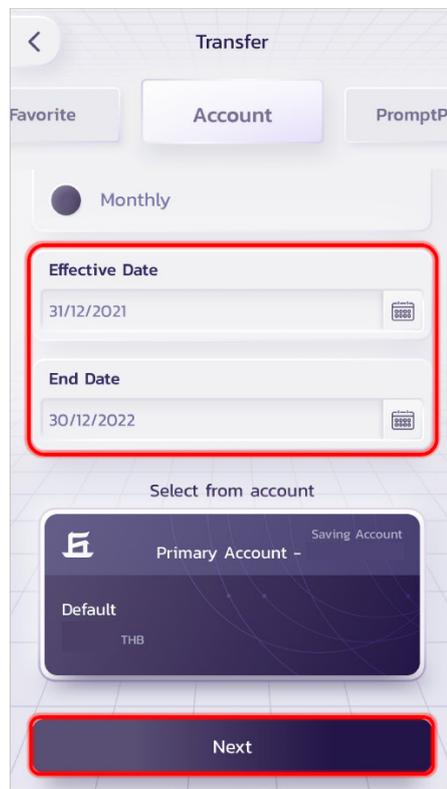
**Step 4:** Select “Monthly”.

**Step 5:** Enter “Effective Date and End Date” > Press “Next”.

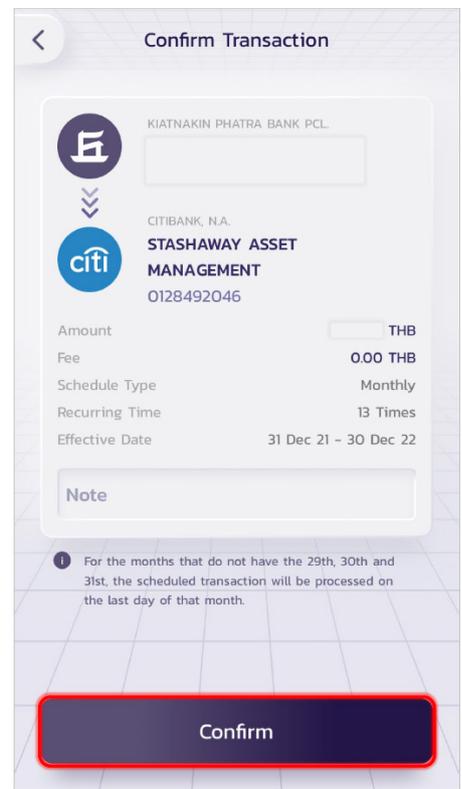
**Step 6:** Review your scheduled transfer details > Click “Confirm”.



(4)



(5)



(6)