

## System requirements

To use LGT SmartBanking Pro, you will need a desktop or laptop computer with one of the following Internet browsers: Google Chrome, Microsoft Edge, Firefox or Safari. You can log in directly via the following link: [smartbanking-pro.lgt.com](http://smartbanking-pro.lgt.com)



### Settings

Here you can select your system language and define your standard client group, among other things. All your changes will take effect the next time you log in.



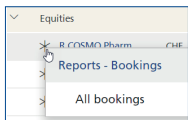
### Messages

You can securely exchange confidential client data and documents with your relationship manager using Messages.



### Mailbox

The mailbox contains all the documents LGT sends you in electronic form, as well as statements of assets and account statements created in the system.



### Right-click to call up actions and details

Right-clicking on any entry marked with a symbol opens a submenu from which you can instigate actions or view additional details.



### Print, edit, export view

This symbol allows you to show and hide rows or columns, enable filters, export views as PDF or CSV files and print them.



### Show/hide

Click on the arrow symbol to show or hide details for a particular area.



### Pending instructions

The exclamation point indicates pending instructions or orders that are not yet settled.



### Filter

Additional filters can be added via this symbol.



### Additional reports

In the Portfoliobook, various reports relating to the selected client group can be accessed via this symbol.

Further information and demo videos about LGT SmartBanking Pro can be found at [www.lgt.com/smartbankingpro](http://www.lgt.com/smartbankingpro)

## Quick start guide

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Portfoliobook Portfolio Workbook

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### Portfoliobook

The Portfoliobook (multiclient view) provides a consolidated view of all client relationships or one client group defined by you or your administrator.

2

### Portfolio

Under Portfolio (single client view) you can see details of a client relationship's assets and their development. Other details such as authorized persons or mailing instructions are also displayed.

3

### Workbook

In the Workbook you can create statements of assets, account statements and analyses for one or more client relationships and access the data archive.

## Portfolio functions



### Cockpit settings

You can define the desired period of time for the portfolio overview in the cockpit settings.



### Order statement of assets

This symbol in the Portfolio view lets you order personalized statements of assets.



### Request account statement

You can request account statements for one or more accounts via this symbol .



### Enter a securities order

You can enter a new securities order via this this symbol.\*



### Enter a foreign exchange order

You can enter a new foreign exchange order via this this symbol.\*



### Enter a standard payment

You can enter a standard payment via this symbol.\*



### Archive access

In the archive, you will find all documents relating to the selected client relationship since the account was opened.

\*Provided you are authorized to do so.