# **myPreferred**



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#### **Meeting with our investment advisors** Get investment advice from our experts at CIMB Wealth Center or via an Online channel.

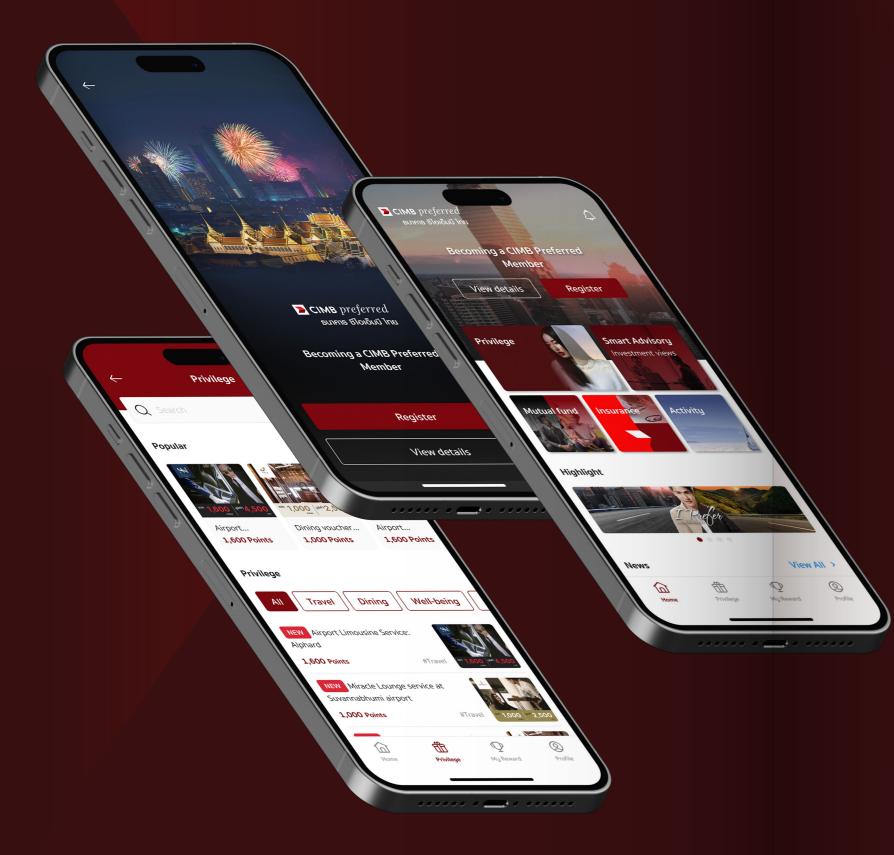


Redemption Process: Participate in CIMB events



My Account

User profile, Point history, and Application Settings.



# **Download myPreferred**

myPreferred application user manual

LIVE THE LIFE YOU PREFER with CIMB Preferred membership. The ultimate individual tier that enables you to enjoy the comprehensive offerings from CIMB Group, a global leading ASEAN bank.

Exclusive for CIMB Preferred members, simply download, choose, and redeem your CIMB Preferred Your Choices privileges via myPreferred application. Receive latest updates about our products, promotions, and activities, and meet our investment advisors at your convenience.

To download myPreferred application, please search for "myPreferred" in Google Play/App store.





GET IT ON **Google Play** 



#### **Registration Process**



**01 Registration Process** In case of using the application for the first time or changing the device the device.

preferred

СІМВ preferred ธนาคาร ซีไอเอ็มบี ไทย

# 01

• myPreferred application start screen.



- Tap "Next" to learn about the application.
- Tap "Skip" to skip to the registration process.
- Tap the language selector in the upper right corner to change the language.

#### **Terms & Conditions**

PLEASE READ & UNDERSTAND THE FOLLOWING TERMS & CONDITIONS WHICH GOVERN YOUR ACCESS OF muPreferred APPLICATION (HEREINAFTER COLLECTIVELY REFERRED TO AS 'THIS APPLICATION') AND USE OF THE SERVICES AS PROVIDED THEREIN (HEREINAFTER ALSO REFERRED TO AS THE 'SERVICES HEREIN'). BY ACCESSING THIS APPLICATION AND/OR USING THE SERVICES HEREIN, YOU AGREE TO BE BOUND BY THESE TERMS & CONDITIONS. IF AT ANY TIME YOU DO NOT ACCEPT ANY OR ALL OF THESE TERMS & CONDITIONS. YOU MUST IMMEDIATELY DISCONTINUE ALL ACCESS OF THIS APPLICATION AND/OR USE OF THE SERVICES HEREIN.

#### General

1. The person entitled to use the application must have the status of CIMB PREFERRED member

2. The person using the application must fill the personal profile and related information by following every step indicated in the application.

3. Any trade mark, service mark or symbol on the

I agree and accept the Terms & Conditions.

Submit

### 03

- Please read the details of the terms & conditions, then tap "Submit" to continue.
- Without accepting the terms & conditions by checking the box, registration will not be processed.



- Enter your registered mobile number, then tap "Register".
- If you have entered an incorrect mobile number, the following message will be displayed "Your mobile number has not been registered with the Bank".
- For non-CIMB Preferred members, tap "Skip registration" to continue.



### 05

- Enter the OTP code to verify your mobile number.
- In case of not receiving the OTP, please tap "Request new OTP".

$\leftarrow$		
Verification		
Please fill your ll Verify your identity	D card/passport r y for security.	10.
Last 4 digits of II	D card/passport n	0.
3001		
		4/4
	Confirm	
1	2 АВС	3 Def
4 <sup>бні</sup>	5 JKL	6 <sup>MNO</sup>
7 pqrs	8 TUV	9 wxyz
	0	$\bigcirc$

- Enter the last 4 digits of your ID number.
- For foreigners, enter the last 4 digits of your passport number.

	ster the device	
-	iPhone 12 Pro (This device) Recently use: 05 Jan 2023, 10:52	
Other de	evices that were registered.	
_	Samsung 150NC Recently use: 14 Sep 2022, 10:51	Remove
	Register	
	07	

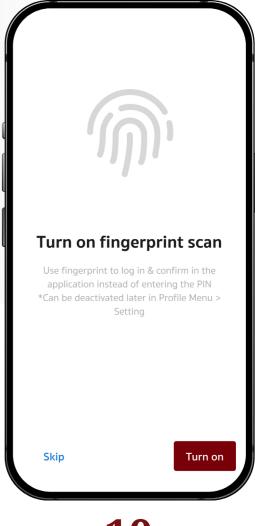
- The current device and other registered device(s) information are shown.
- Tap "Register" to continue.
- Only 2 devices can be registered with the application.
- In case of having more than 2 devices, please tap the **"Remove"** button next to the device name to deactivate the unused one.

÷	Se	t Security	PIN		
	Set Security PIN of 6 digits.				
Instr		) () () for setting		y PIN	
1		2		3	
4	4 5 6				
7	7 8 9				
	0 ←				
	08				

• Set your 6 digits security PIN. This PIN will be used for log in and complete transactions.



• Confirm your security PIN.



- For a mobile that has fingerprint scanner feature, tap the **"Turn on"** button to activate it. This feature allows fingerprint log-in instead of entering the security PIN.
- If you do not wish to turn on this feature at this time, tap the "**Skip**" button to continue.

	7 Consents
הני	
	Consent Form for Collection, Use, and/or Disclosure of Personal Data
	รายละเอียดเพิ่มเติม
Turn on Face ID	Your personal data that the Bank collects, uses and discloses for the purposes set out below includes your personal details, family details, e
Use Face ID to log in & confirm in the application instead of entering the PIN *Can be deactivated later in Profile Menu > Setting	1. Consent for collection, use and/or disclosure of your Personal Data per the Personal Data Protection
	รายละเอียดเพิ่มเติม
	1.1 to offer you the financial products and/or services that are specifically catered to meet your individual specific needs
	Consent     O     Decline
	1.2 to offer you the financial products and/or
Skip Turn on	Confirm
11	12

- For a mobile that has facial recognition feature, tap the **"Turn on"** button to activate it. This feature allows face recognition log-in instead of entering the security PIN.
- If you do not wish to turn on this feature at this time, tap the **"Skip"** button to continue.
- Complete the 7 consent form to finish the registration process.

>

>

#### **Login Process**





- myPreferred application start screen.
- Enter Security PIN 6 Digits.

  Please Enter Security PIN 6 Digits.

  O

  Forgot PIN?

  1
  2

  3

  4
  5

  6

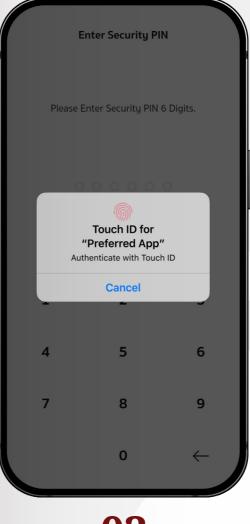
  7
  8

  9

  0

  0

  €
- Enter your security PIN to continue.

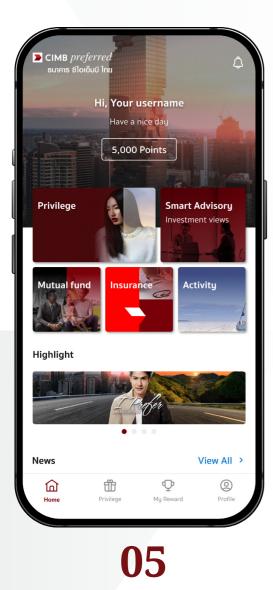


### 03

• If the fingerprint scanner feature is activated, scan your fingerprint to continue.



• If the facial recognition feature is activated, scan your face to continue.



• After successful login, homepage of myPreferred application will appear.



# **103** Forgot PIN You can use authentication to set a new PIN code.

		Enter Security PIN		
[	Plea	ase Enter Security PIN 6	Digits.	
	OOOOOOO			
L	1	2	3	
	4 5 6			
	7	8	9	
		0	$\leftarrow$	
		01		

• In case you forget your security PIN, tap the **"Forgot PIN?"** to reset.

Fotgot PIN ID card/passport number 1759900093888 13/13 Date of birth E.g. 01/01/1980 Ħ 21/05/1969 Continue 3 Def <u>2</u> авс 1 5 JKL 6 <sup>м N O</sup> 4 <sub>бні</sub> 7 pqrs 8 <sup>т и у</sup> 9 wxyz 0  $\bigcirc$ 02

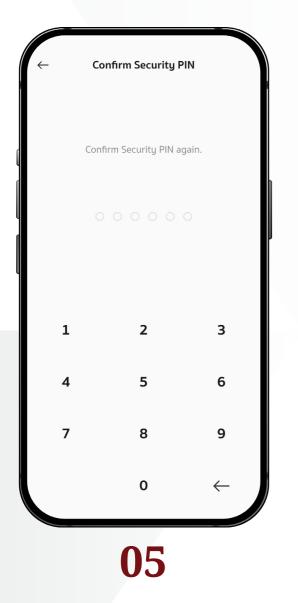
• Enter your ID/passport number and date of birth, then tap **"Continue"** to continue.

	y mobile nu u received via SMS. x 0 0 Re	
1	2 АВС	3 DEF
4 6н1	5 JKL	6 мно
7 PQRS	8 TUV	9 wxyz
	0	0
	03	

- Enter the OTP code to verify your mobile number.
- In case of not receiving the OTP, please tap "**Request new OTP**".

÷	Set Security PIN	
Se Se	et Security PIN of 6 di	gits.
Instruct	ions for setting Se	
1	2	3
4	5	6
7	8	9
	0	$\leftarrow$
	04	

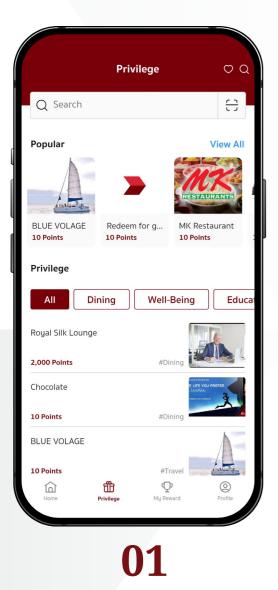
• Set a new security PIN.



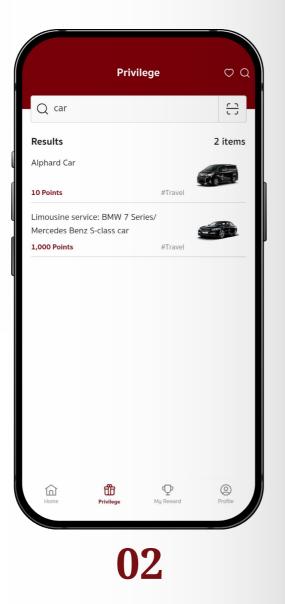
• Confirm your new security PIN.

#### **Redemption Process: Reservation Service**

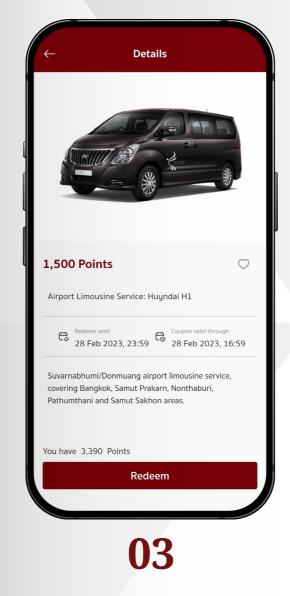




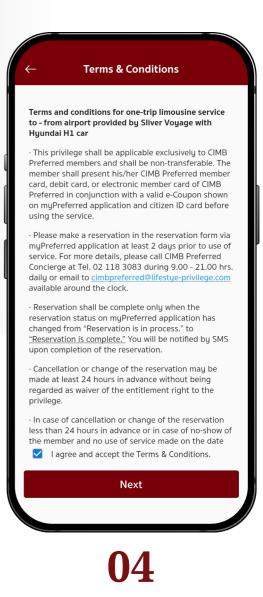
• The Privilege page shows popular privileges and other privileges separated into categories.



• To find specific privileges, please either enter the keywords in search box, or use the QR code search.



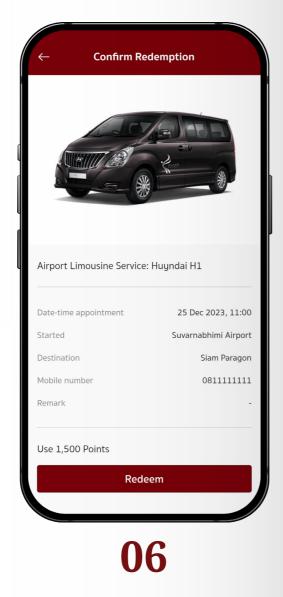
• Once selected, the details of the privileges will appear. Tap "**Redeem**" to continue.



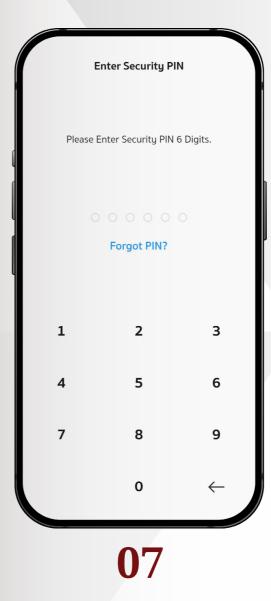
• Accept terms & conditions, and tap "Next".

← Booking Detail	
Date you want to pick up, eg. 01/01/2023	
25/12/2023	Ë
Time you want to pick up	
11.00	$\sim$
Started	
Suvarnabhimi Airport	
Destination	
Siam Paragon	
Mobile number	
081111111	
Remark	
Submit	

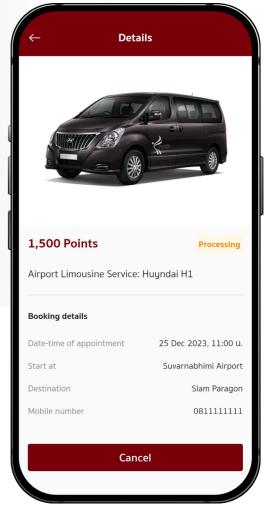
• Please fill in the reservation form and tap **"Submit"** to continue.



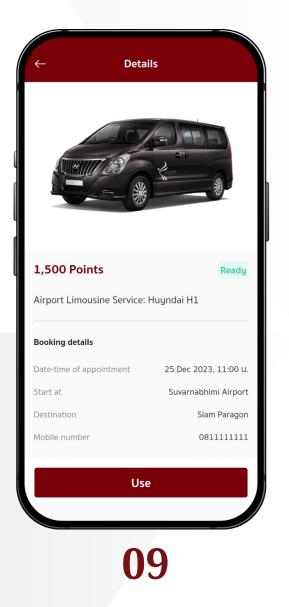
• Review reservation details and required points, then tap **"Redeem"** to continue.



• Enter the security PIN, scan your fingerprint, or scan your face to confirm the redemption.



- Coupon status is changed to "**Processing**". All available coupons can be viewed in the "**My Reward**" menu.
- To cancel the reservation, tap the **"Cancel"** button.



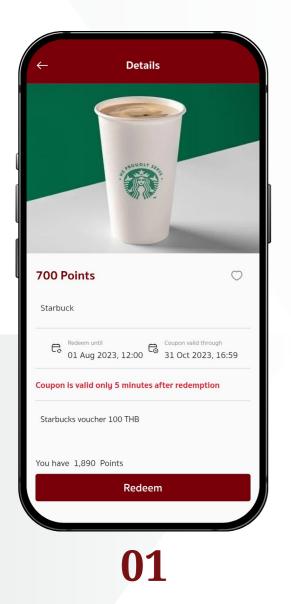
- Once the reservation process is done, coupon status will be changed to "**Ready**".
- To use the coupon, tap the **"Use"** button.

← Deta	ils
QR for merchant Valid through 05 Jan 2023, 03:46 U.	Booking number
	Starbuck000040
Coupon number	
Coupon number Use When pressed to use, the sy page for using	e Istem will take you to the
Use When pressed to use, the sy	e Istem will take you to the
Use When pressed to use, the sy page for using	e jstem will take you to the g coupons.
Use When pressed to use, the sy page for using Booking details	e jstem will take you to the g coupons.
Use When pressed to use, the sy page for using Booking details Date-time of appointment	2 Istem will take you to the g coupons. 25 Dec 2023, 11:00 u.

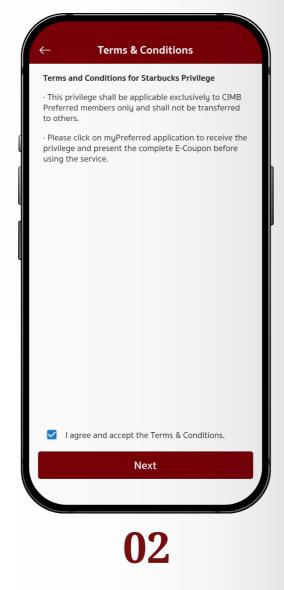
- After tapping the **"Use"** button in the previous page, QR code, barcode,
- and coupon number will appear.
  Then tap the "Use" button in this page again to copy the coupon number and proceed to the next page to activate the coupon.

#### Redemption Process: E-Coupon

### 05 Redemption Process: E-Coupon



• Select the e-coupon privilege, read the details, then tap the **"Redeem"** button to continue.



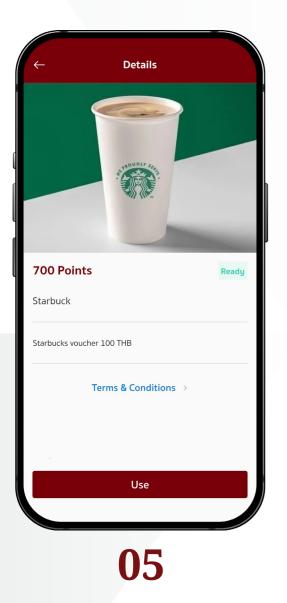
• Accept terms & conditions, and tap "Next".



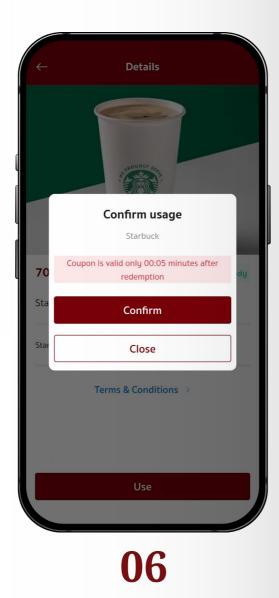
• Review details and required points, then tap "**Redeem**" to continue.

$\bigcap$	Enter Security PI	'		
Please	e Enter Security PIN 6	5 Digits.		
	0 0 0 0 0	0		
	Forgot PIN?			
1	2	3		
4	4 5 6			
7	8	9		
	0 ←			
	04			

• Either enter the security PIN, scan your fingerprint, or scan your face to confirm the redemption.



- Once the redemption process is done, coupon status will be changed to "**Ready**".
- To use the coupon, tap the **"Use"** button.



- A popup will appear and inform about coupon conditions and period.
- Please tap "Confirm" to continue.



- After tapping **"Confirm"** button in the previous page, the QR code, barcode, and coupon number will appear.
- Then tap the "Use" button in this page again to copy the coupon number and proceed to the next page to activate the coupon.

Interest Conditions and Interest of Second S	+	Details	
Starbuck Starbucks voucher 100 THB Terms & Conditions >		PROUDLY R.	
Starbucks voucher 100 THB	700 Poin	ts	Used
Terms & Conditions →	Starbuck		
	Starbucks vou	icher 100 THB	
Use		Terms & Conditions >	
Use			
Use			
		Use	
08		00	

• Once the coupon period ends, coupon status will be changed to "**Used**".

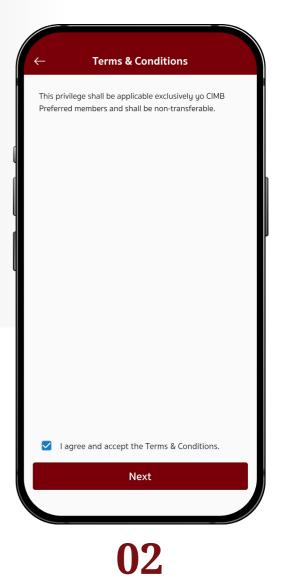
#### Redemption Process: Voucher



### 01

• Select the voucher privilege, read the details, then tap the **"Redeem"** button to continue.

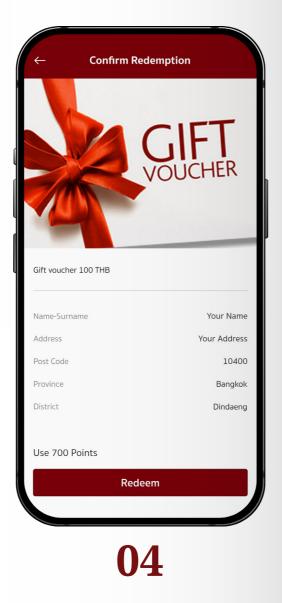
#### **06** Redemption Process: Voucher



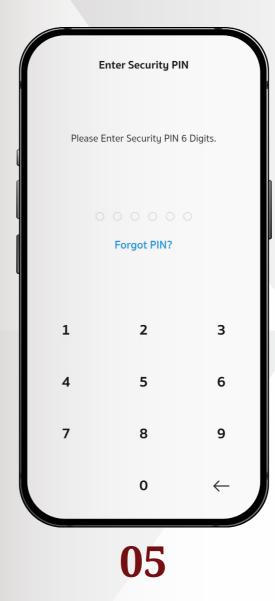
• Accept terms & conditions, and tap "Next".

← Delivery	detail
Name-Surname	
Your Name	
Address	
Your Address	
Province	
Bangkok	$\sim$
District	
Dindaeng	$\sim$
Sub District	
Dindaeng	$\sim$
Post Code	
10400	
Subn	nit
	2

• Please fill in the delivery information and tap **"Submit"** to continue.



• Review the delivery details, required points, and tap **"Redeem"** to continue.



• Either enter the security PIN, scan your fingerprint, or scan your face to confirm the redemption.

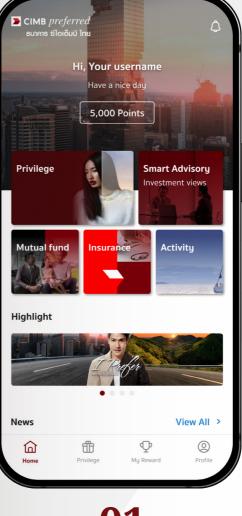
← Details	
C C V C	DUCHER
700 Points	Used
Gift voucher 100 THB	
<b>QR for merchant</b> Valid through 05 Jan 2023, 03:46 u.	Booking number
You will receive coupon within 1	4 working days
Name-Surname	Your Name
Address	Your Address
	10400
Post Code	

• Coupon status is changed to **"Used"**, and the voucher will be delivered to your address.

#### **Meeting with ourt investment advisors**



Get investment advices from our experts at CIMB Wealth Center or via an Online channel.



01

• Tap the "Smart Advisory Investment views" menu.

ہر ng	(The second seco
	My Bookings
s	View All 🗲
C.	
M	Name Surname Mutual Fund 01 Jan 2023, 2:00-4:00 PM
lucts	View All 👂
Product 01 Investment Grade	e Bond subscription
Product 02 Ministry of Finan	ce Savings Bonds
Product 03 Best mutual fund	I from CIMB
	M Iucts Product 01 Investment Grade Product 02 Ministry of Finan Product 03

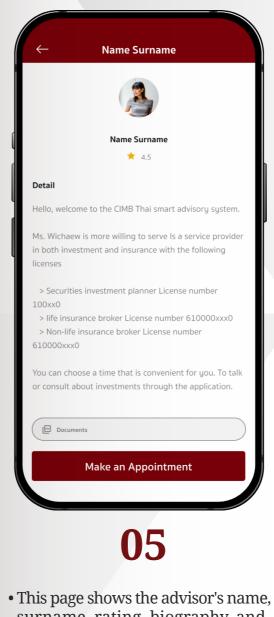
• Tap the "Book a meeting" menu to make an appointment.

← Smart Advisory	Q
Q Name Surname	۲
Choose Advisor	
Name Surname View more details • ★ 4.5	>
03	

- Select an advisor you want to consult from the list.
- You can search for a specific advisor by entering the name in the search box.

$\leftarrow$	Smart Ac	lvisory	Q
Q Name Surnar			8
Choose Advisor			
	Surname		>
Name * 4.	<b>Surname</b>		
Make an app	ointment		
View Profile			
	04	4	

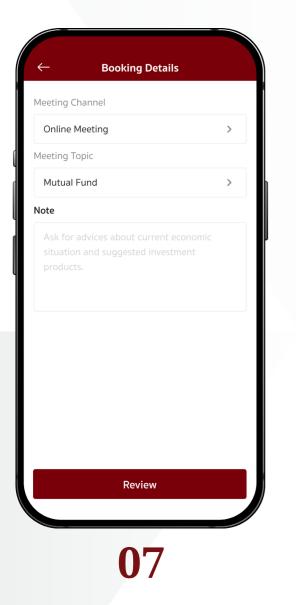
- Once an investment advisor is selected, tap "Make an appointment" to proceed.
- Tap **"View Profile"** to view more details about investment advisors.



- This page snows the advisor's name, surname, rating, biography, and other related documents.
  Tap "Make an Appointment"
- Tap **"Make an Appointment**" button to continue.

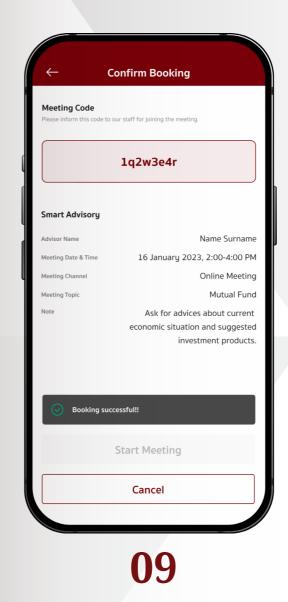
$\leftarrow$		Adviso	or's Ca	lendar		
January 2023 <						
S	М	Т	W	т	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				
Monday 16						
Ö	🖬 08:00 - 10:00				Ca	ncel
i 12:00 - 14:00						
ā	14:00	- 16:00	)	В	ook this	slot
ä	16:00	- 18:00	)	B	ook this	slot

- 06
- Select your preferred date from the calendar. The available consultation slots will be shown thereunder.





- Enter appointment details, then tap the **"Review"** button.
- Tap the **"Make an appointment"** button to reserve the advisor's time slot.



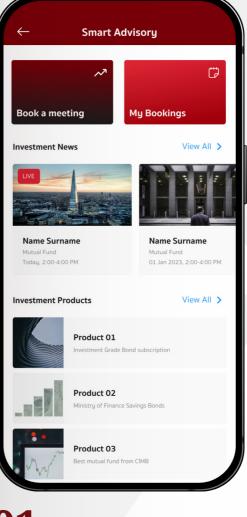
- Appointment confirmation and details
- For in-person appointment at your chosen CIMB Wealth Center, upon the appointment time, please inform the staff of the appointment code as shown in the screen.
- For online meeting, please tap the "Start Meeting" button at the scheduled time.

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#### **Financial and Investment** consulting process



For Online Meeting channel



#### 01

• All scheduled meetings can be viewed in the "My bookings" menu.

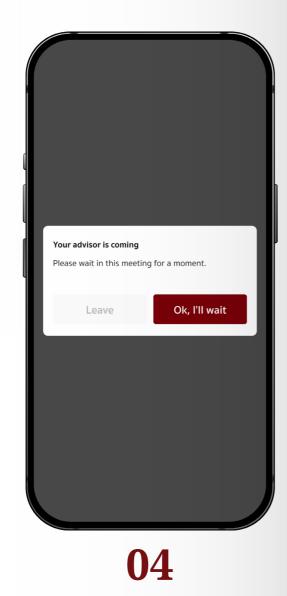
# **08** Financial and Investment consulting process

← My B	Bookings
Upcoming	Previous
14 January 2023	
Mame Surname Mutual Fund Online Meeting	2:00-4:00 PM
26 January 2023	
Mame Surname Mutual Fund Central Plaza Grand Ram	2:00-4:00 PM
(	)2

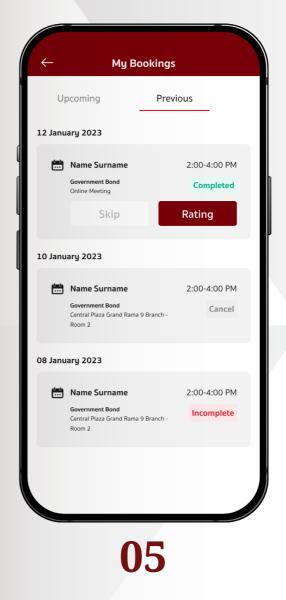
- My bookings menu shows upcoming and previous meetings (completed/passed).
- Please select the meeting when the scheduled time arrives.

Meeting Code Please inform this code to our staff for joining the meeting				
1q2w3e4r				
Smart Advisory				
Advisor Name	Name Surname			
Meeting Date & Time	14 January 2023, 2:00-4:00 PM			
Meeting Channel	Online Meeting			
Meeting Topic	Mutual Fund			
Note	Ask for advice and advice about with the current economic situation			
	Start Meeting			
	Cancel			





• If an advisor is not yet available, the popup will show a message informing you to please wait in the online meeting room.



- Once the meeting ends, it will be moved to the "Previous" tab.
  Please also rate the advisor by
- tapping the "**Rating**" button.

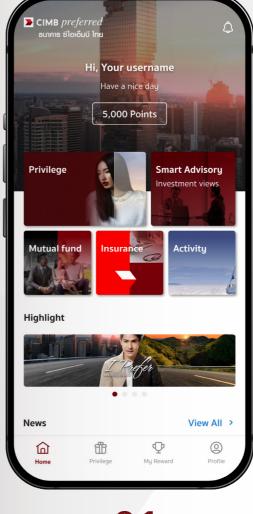
$\leftarrow$	Rating	
	3	
	How do you rate this meeting?	
	$\star \star \star \star \star$	
Note		
Great ir	nform. Well done	
	Comfirm	



- Give a 1-to-5-star rating and note (if any), then tap the **"Confirm"** button.
- The average rating will be shown on the investment advisor's detail page.

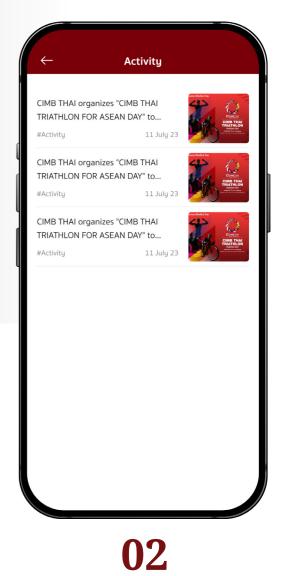
#### **Redemption Process: Participate in CIMB events**

# **09** Redemption Process: Participate in CIMB events



01

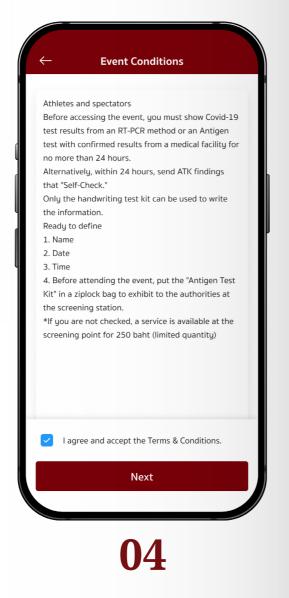
• All the upcoming events can be viewed in the "Activity" menu.



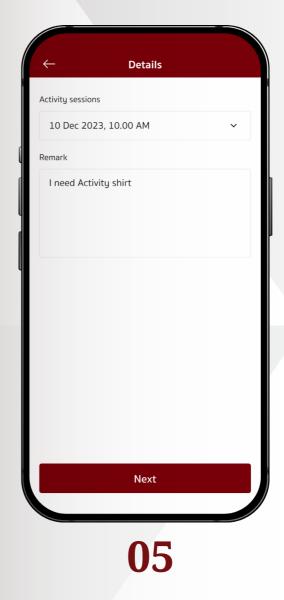
#### • Activity list is shown on this page.



• From the activity list, select an activity you would like to participate, read details, then tap **"Register"** button to proceed.



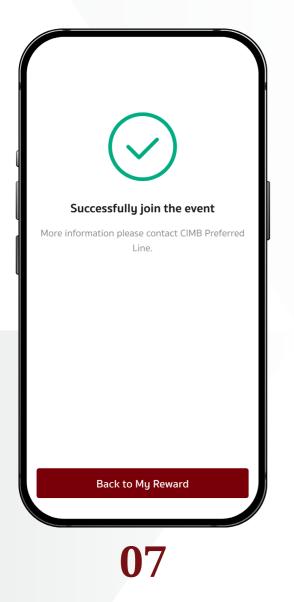
• Please read the terms & conditions, check the box below to accept, and tap the "**Next**" button.

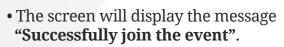


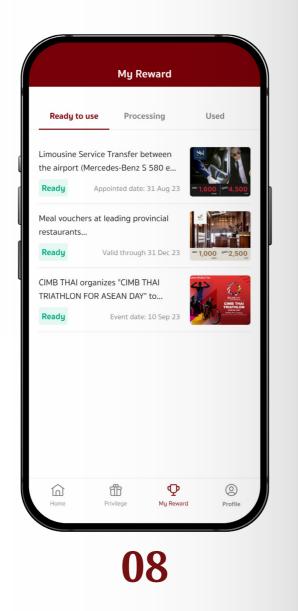
• Choose the date and time of the selected activity, then tap the "Next" button.



• Review activity details, then tap the **"Join the Event"** button.





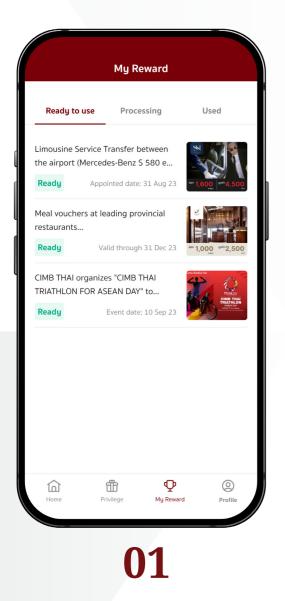


• The registered events will appear in the **"My Reward"** menu, under the Ready to use tab.

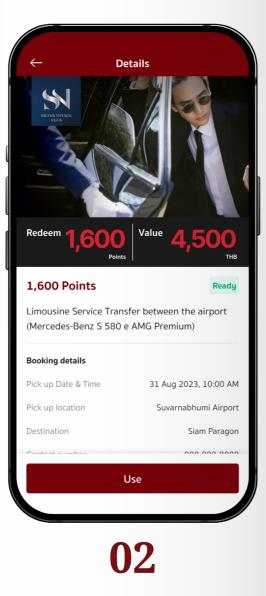
#### My Reward



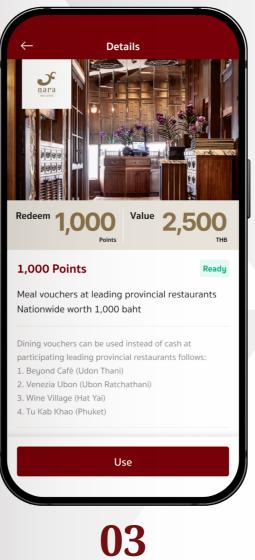
# **10** My Reward Simply check your privilege redemptions.



- My Reward menu is divided into 3 tabs.
- The Ready to use tab shows verified and ready-to-use coupons.



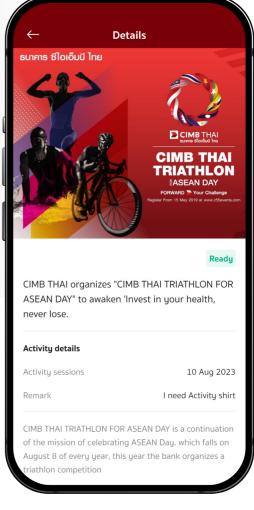
- You can check coupon details on this page.
- To redeem Reservation Coupons, tap **"Use"** button to proceed.



• To redeem E- Coupons, tap **"Use"** button to proceed and show it to

the restaurant or store staff.

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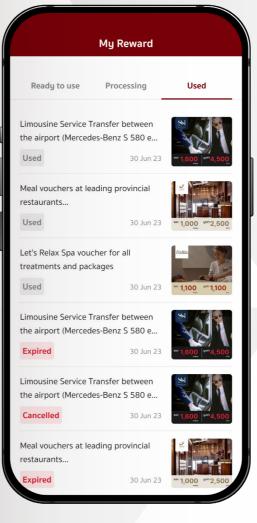
• The registered events will be displayed in the Available tab with other types of coupons.

	My R	leward		
Ready to (	use Proc	essing	Used	
the airport (N	rvice Transfer I lercedes-Benz Appointed date	S 580 e	m 1,600 un 4,500	
Home	Privilege	<b>P</b> My Reward	© Profile	
		_		

• The Processing tab collects coupons for pre-booking services (reservation) that are waiting for service provider confirmation.

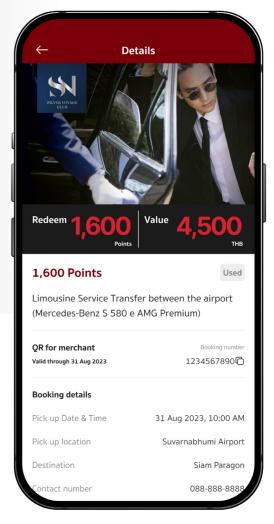
← <u>ı</u>	Details
Redeem 1,600	Value 4,500
Poir <b>1,600 Points</b> Limousine Service Tra (Mercedes-Benz S 58(	Processing nsfer between the airport
Booking details	
Pick up Date & Time	31 Aug 2023, 10:00 AM
	31 Aug 2023, 10:00 AM Suvarnabhumi Airport
Pick up Date & Time	
Pick up Date & Time Pick up location Destination	Suvarnabhumi Airport Siam Paragon
Pick up Date & Time Pick up location Destination	Suvarnabhumi Airport Siam Paragon
Pick up Date & Time Pick up location Destination	Suvarnabhumi Airport Siam Paragon

- Reservation details.
- You can cancel the reservation by tapping the "Cancel" button.



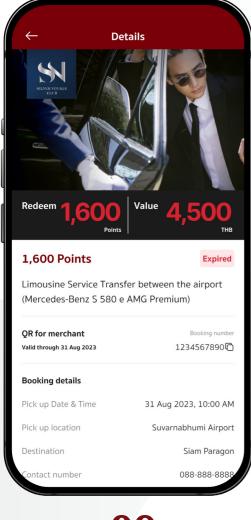
### 07

• The Used tab collects coupons that are used, expired, and canceled.



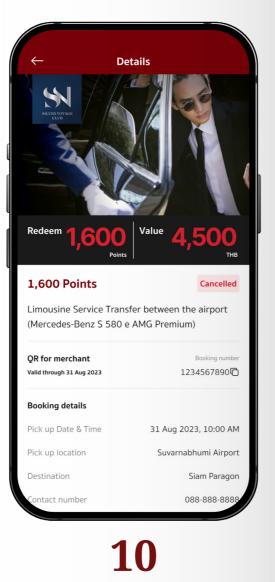


• Used coupon shows details and date of use.



09

• Expired coupon displays details and expiration date.



• Canceled coupon displays details and cancelled date.

My Account

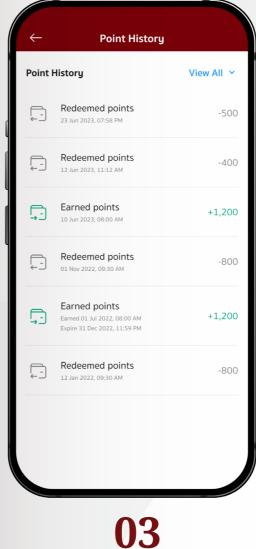
# User profile, Points history, and Application Settings.

ธนาคาร ซีไอเอ็มบี ไทย Your username > Preferred   No. TH000012		)
Setting		
E Language	English	>
Change password		>
ြော Fingerprint / Face ID	Off	>
Help		
📞 Contract us		>
How to use App		>
Others		
7 Consents		>

• My Account is divided into 2 sections: User profile and Application settings.

← Prof	file
Your use	
Relationship manager	Name Surname
Preferred Preferred* Preferred	Preferred Private
View Preferred member be	Elite Wealth
You have <b>5,000</b> point	Redeem
Close to expiration	
Expire on 10 Aug 2023	100
Point History	View All >
0	2

- View user profile and RM name
- This page shows
- Your Preferred tier
- More details of Preferred member benefits
- Remaining points, expired points, and point history



- This page shows the history of your point redemption. The record shows redeemed and earned points. • By tapping the dropdown list at the top right corner, the point redemption history can be filtered and viewed by month.

Setting	3		
Ę	Language	English	>
ēð	Change password		>
ج	Fingerprint / Face ID	Off	>
Help			
S	Contract us		>
$\square$	How to use App		>
Others	;		
$\bigcirc$	7 Consents		>
	Terms & Conditions		>
	Version 1.01.8888		
	Logout		

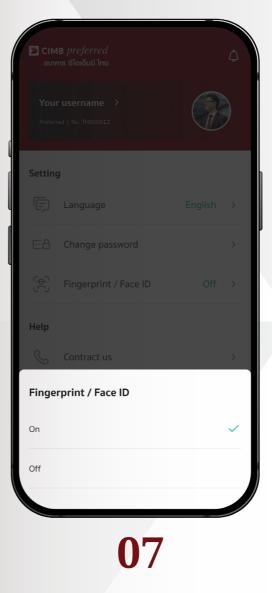
• Setting menu enables customization to your application.

Setting	ภาษาไทย	
Setting         Image       English       >         Image       Change password       >         Image       Fingerprint / Face ID       Off       >         Help       Image       Image       Image       Image	Language	
Setting □ Language English > □ A Change password >		>
Setting	Fingerprint / Face ID	Off >
Setting	Change password	· · · · · ·
		English >
Your username >		

• Select "Language" in **"Setting"** to change the display language within the application.

← Se	t Security	PIN	
Set Sec	curity PIN of	6 digits	
Instructions	for setting	Security PIN	
1	2	3	
4	5	6	
7	8	9	
	0	÷	)
	06		

• Select **"Change Password"** in **"Setting"** to change the security PIN. The current security PIN must be entered to set the new one.



• Select **"Fingerprint/Face ID"** in **"Setting"** to enable or disable fingerprint/face scanning instead of using security PIN.

+	Contact Us	
Conta	ct Us	
S	CIMB Preferred Line	>
Follow	r Us	
f	Facebook CIMB Preferred	>

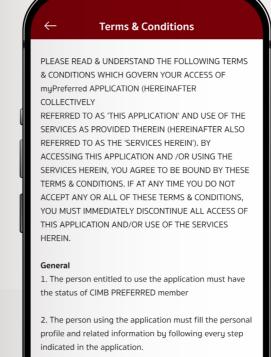
- 08
- Select **"Contact us"** in **"Help"** to view the Bank's contact information.
- Tap on the **"CIMB Preferred Line"** to contact customer service.
- Tap on **"Facebook CIMB Preferred"** to be navigated to the CIMB Preferred Facebook page.

Done	My Preferre	Q @
Done	My Preferre	
	myPreferred	
	>	
 ①		
	00	

• Select **"How to use App"** in **"Help"** to read the user manual application.

	orm for Col		Use, and/	or
Disclosure	of Persona	al Data		
รายละเอียดเ	พิ่มเติม			>
and disclo	ersonal data t ses for the pr pur personal	urposes se	et out below	v
	t for collect			
disclosure	of your Pe Data Protec	rsonal D		ne >
disclosure Personal I รายละเอียดท 1.1 to offer services tha	of your Pe Data Protec	tion tion	ata per th	>
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disclosure Personal I รายละเอียดก 1.1 to offer services tha individual sp	of your Pe Data Protec พิ่มเติม you the finai t are specific pecific needs	ncial prod ally catero ncial prod ncial prod cting a su	ata per th ucts and/or ed to meet Decline ucts and/or rvey for ma	> your arketing
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disclosure Personal I รายละเอียดก 1.1 to offer services tha individual sp	of your Pe Data Protect พิ่มเติม you the final t are specific pecific needs sent you the final uding condu erated bu var	ncial prod ally catero ncial prod cting a su ious servi	ata per th ucts and/or ed to meet Decline ucts and/or rvey for ma	> your arketing

• Select "**Consent**" (Personal Data Management) in "**Others**" to review the customer consent request regarding the collection, use, and disclosure of personal information.



3. Any trade mark, service mark or symbol on the application is the Bank's intelligent property, which no one can copy, modify, or do anything that violates the related laws.

4. The personal profile of application user and any data filler in the application will he sent via the Internet which

# 11

• Select **"Term & Conditions"** in **"Others"** to read the terms of the agreement and terms of use of the application.

		¢
ตั้งค่า		
Do	Log out o you want to log out and close myPrefer application?	red
	Confirm	
	Close	
	Close Contract us	
	Close	> >
	Close Contract us	

#### 12

• In order to log out from the application, tap the **"Logout"** button.

