

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 'Deposit' icon at the top left corner > select 'Put money in'.
3. Select 'Set up Monthly deposits'.
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

**SCB**  
ไทยพาณิชย์





### 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.

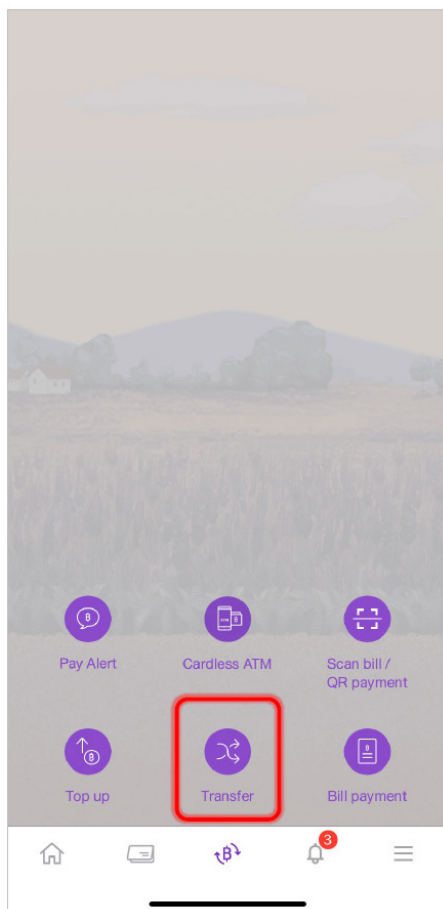
**Step 3:** Enter the recipient’s account number and transfer amount > Click at “Set a schedule”.

#### Recipient’s bank account details

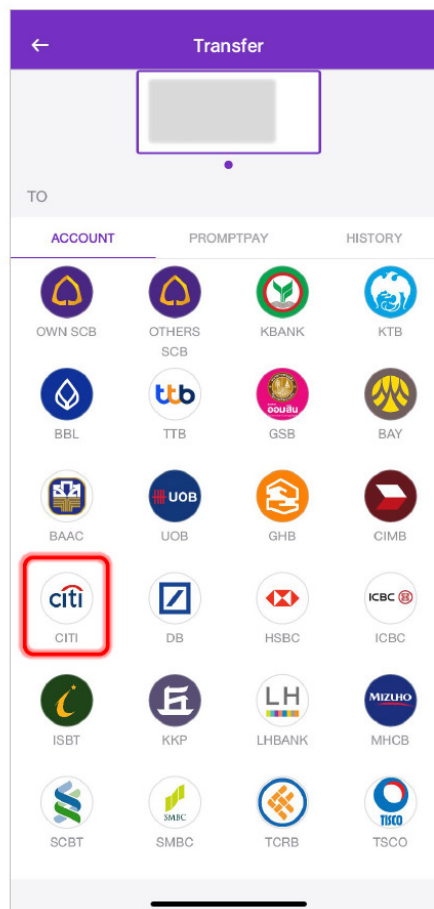
Bank: Citibank

Account number: 0-128492-046

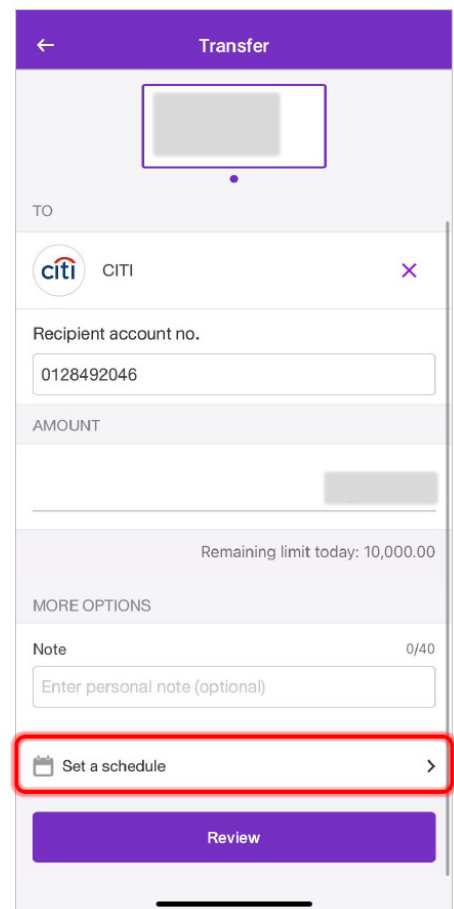
Account name: StashAway Asset Management



(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

TO

citi CITI

Recipient account no.  
0128492046

AMOUNT

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

TO STASHAWAY ASSET MANAGEMENT  
0128492046

AMOUNT

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





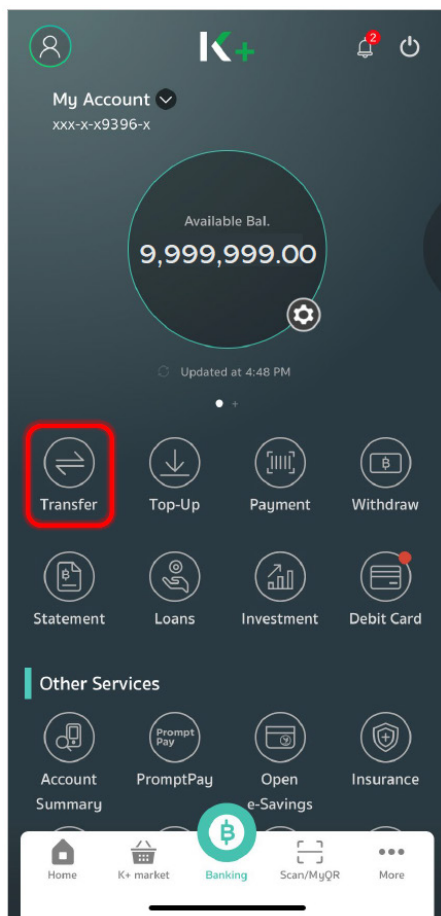


### Bank Transfer Scheduling Guide

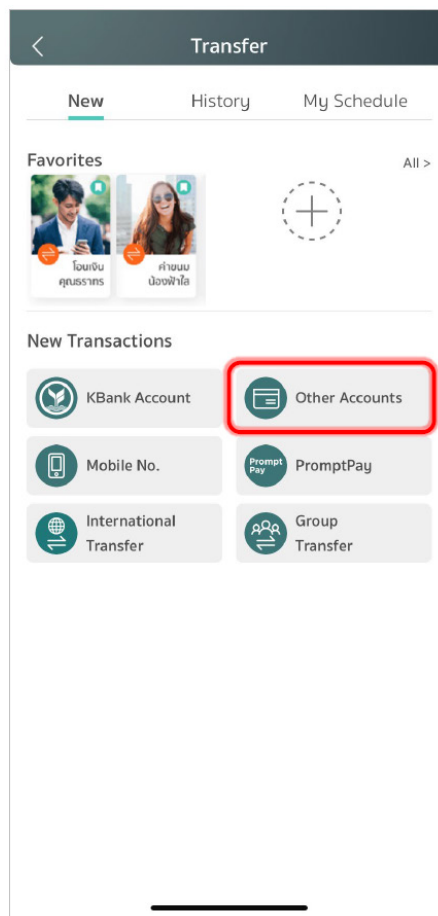
**Step 1:** Log in to K PLUS application > Click “Banking” > Enter your pin > Select “Transfer”.

**Step 2:** Select “Other Accounts”.

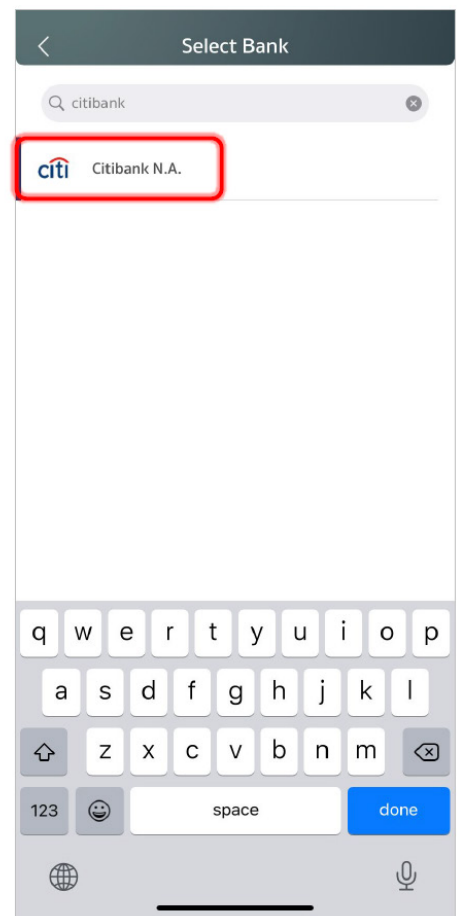
**Step 3:** Select “Citibank N.A.” as the recipient bank.



(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”.

The screenshot shows the 'Transfer' screen. At the top, it says 'From: My Account' with a masked account number and balance. Below, there are two tabs: 'Now' and 'Schedule'. The 'Schedule' tab is selected and highlighted with a red box. Under the 'Schedule' tab, it shows 'To: Other Accounts' with a dropdown menu set to 'Citibank N.A.'. Below that, the 'Account No.' is entered as '012-8-49204-6'. The 'Amount' field is empty, followed by a 'Baht' unit label. The 'Frequency' section has three options: 'Once', 'Weekly', and 'Monthly'. The 'Monthly' option is selected. Below the frequency, the 'Schedule Name' is 'recurring transfer StashAway'. At the bottom, there are 'Cancel' and 'Next' buttons. The 'Next' button is a grey arrow pointing right.

(4)

This screenshot is a continuation of the previous one, showing the 'Frequency' section more clearly. The 'Monthly' option is selected with a green dot. Below the frequency, the 'Schedule Name' is 'recurring transfer StashAway'. There is a note: 'Note: In case a month does not contain your chosen date, your transaction will be completed at the end of that month.' Below this, the 'Start Date' is 'Nov 21' and the 'End Date' is 'Sep 22'. At the bottom, there are 'Cancel' and 'Next' buttons. The 'Next' button is a green arrow pointing right and is highlighted with a red box.

(5)

The screenshot shows the 'Review' screen. It displays the transfer details: 'From: My Account', 'To: STASHAWAY ASSET MANAGEMENT', 'Citibank N.A.', and 'Account No. 012-8-49204-6'. Below this, it says 'Amount: Baht'. The 'Schedule Name' is 'StashAway' and the 'Effective Date' is 'Every 10 (Jun 22 - Dec 22)'. There is a warning message: 'Beware of scammers ! Please verify the recipient's account information. Once confirmed, it cannot be changed. (Any suspicious, please cancel and select menu "More" >> "Contact us")'. Below the review, there is a 'Memo' field and a 'Category: Others' dropdown. At the bottom, there are 'Cancel' and 'Confirm' buttons. The 'Confirm' button is a green circle with a white checkmark and is highlighted with a red box.

(6)





## Bank Transfer Scheduling Guide

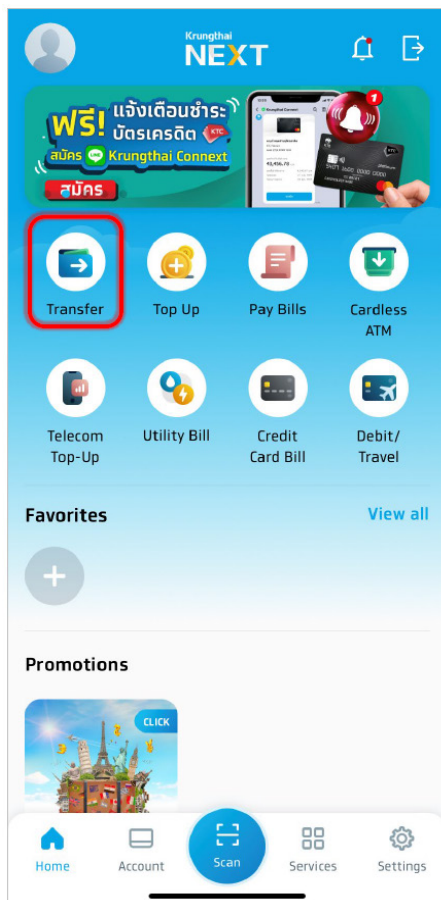
**Step 1:** Log in to Krungthai NEXT application > Select “Transfer” > Enter your pin.

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

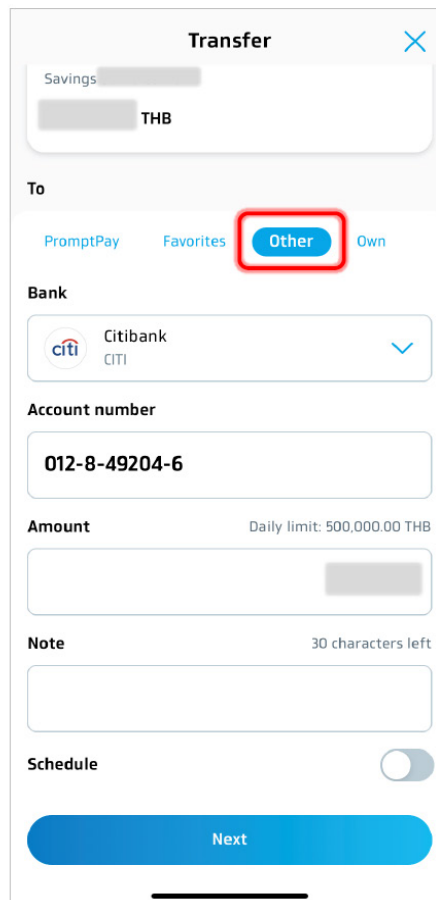
### Recipient’s bank account details

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

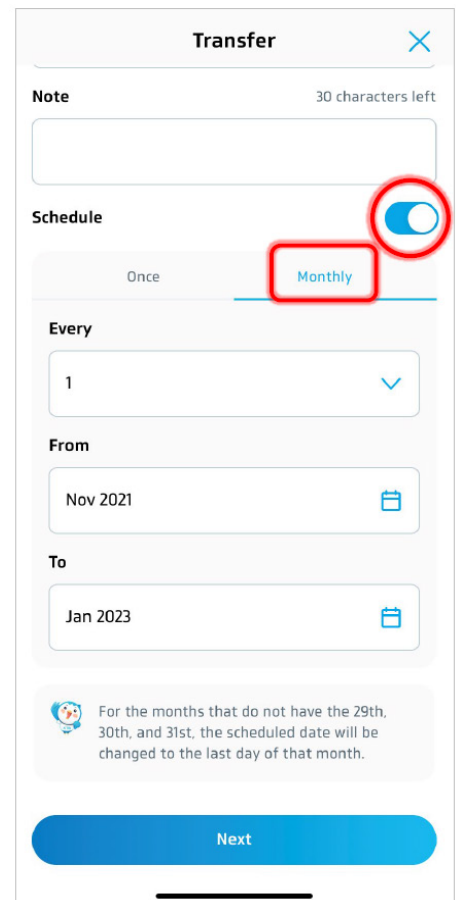
**Step 3:** Turn on “Schedule” button > Select “Monthly”.



(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

Schedule

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

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

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

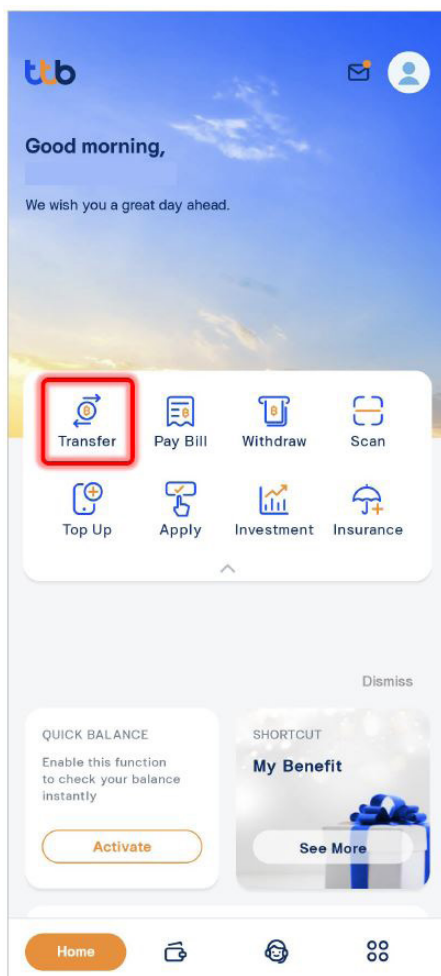
**Step 1:** Log in to ttb touch application > Go to “Home” > Select “Transfer”.

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

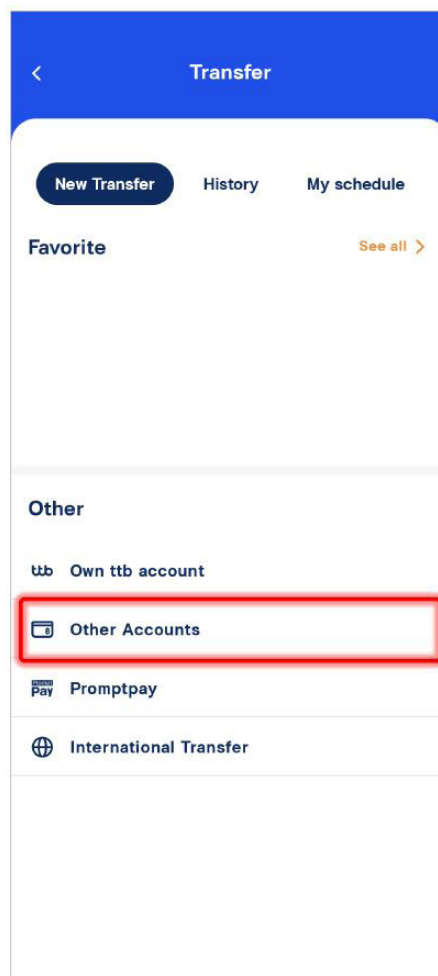
### Recipient’s bank account details

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

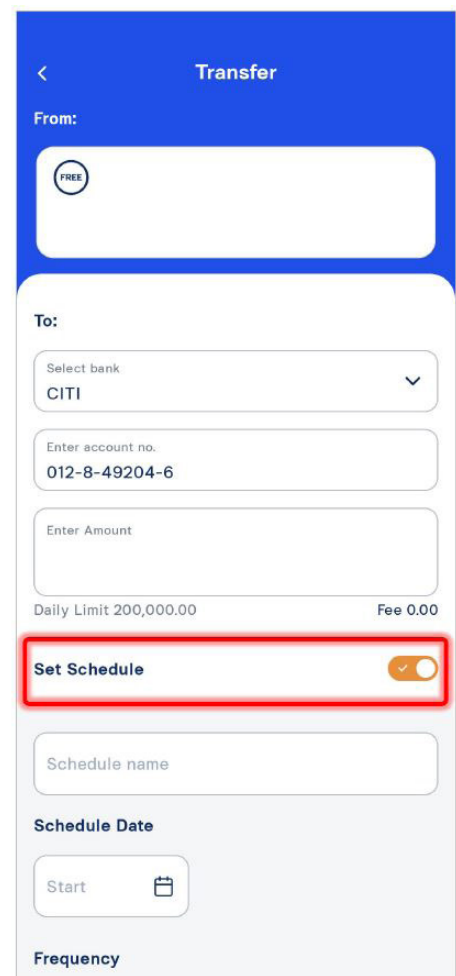
**Step 3:** Click “Set Schedule”.



(1)



(2)



(3)



### Bank Transfer Scheduling Guide

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

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

Transfer

Schedule name

StashAway

Schedule Date

Start

4 Feb 23

Date

4

Note: In case a month does not contain your chosen date, your transaction will be completed at the end of that month

Frequency

☐ Once
 ☐ Weekly
 ☒ Monthly

Define Times By

☒ Specify end date
 

End date

5 Feb 23

☐ Amount of times
 

Times

Note (Optional)

Category (Optional)

Savings & Investment

Foods & Drinks

Bills & Uti

Add Schedule

(4)

Review Schedule

Schedule name

StashAway

ttb

ttb

citi

STASHAWAY ASSET MANAGEMENT

012-8-49204-6

CITI

Schedule detail

Amount	
Fee	0.00
Duration	10 Feb 23-11 Feb 23
Date	10
Frequency	Monthly
Times	1

Category:

Savings & Investment

Confirm

Cancel

(5)







### Bank Transfer Scheduling Guide

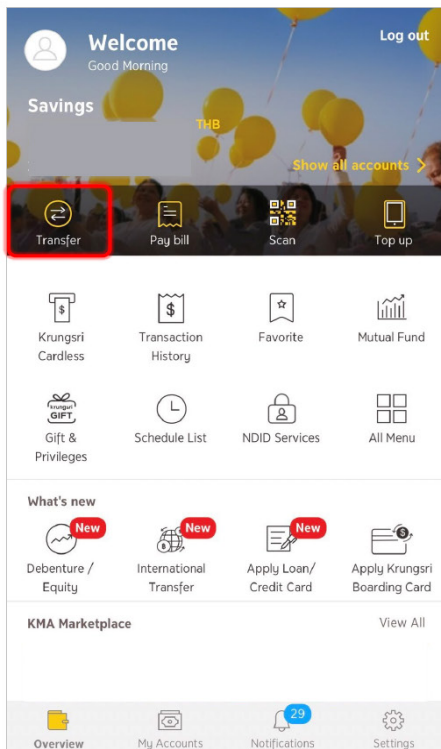
**Step 1:** Log in to Krungsri Mobile App application > Select “Transfer”.

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

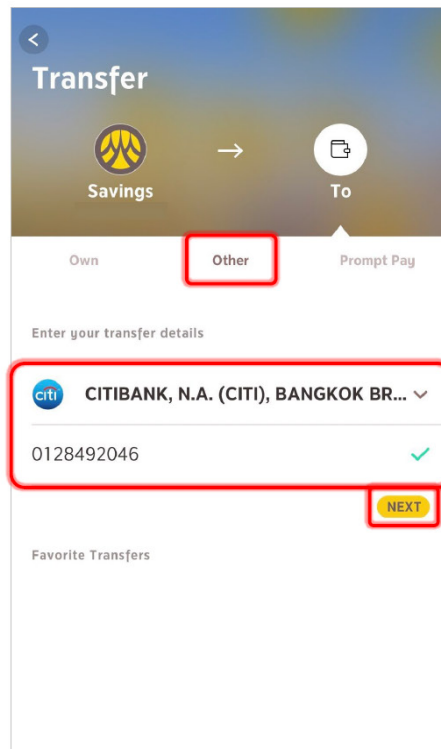
#### Recipient’s bank account details

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

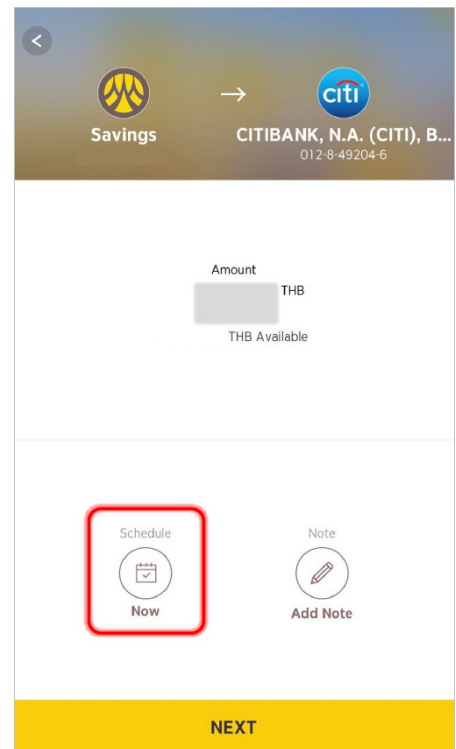
**Step 3:** Select “Schedule Now” to set up recurring transfers.



(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  
↓  
To  
CITI STASHAWAY ASSET MANAGEMEN  
012-8-49204-6

Amount  
\$ +0.00 THB fee

Ref No.  
#

Transaction Date  
🕒 05 Nov 2021 20:02:56

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

CONFIRM

(6)



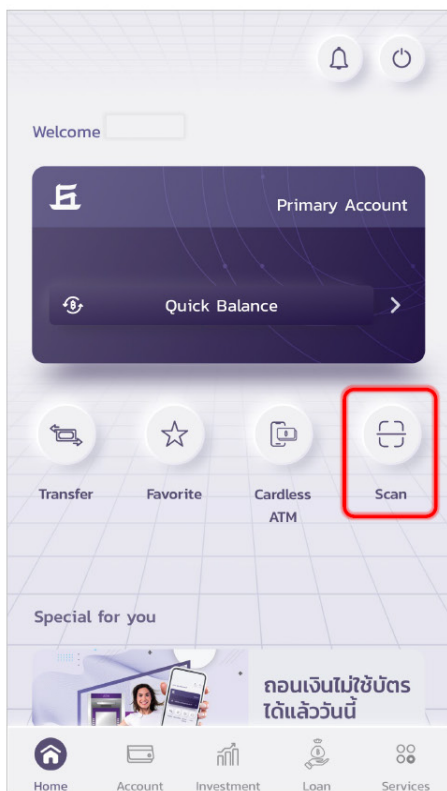


### QR Code Transfer Scheduling Guide

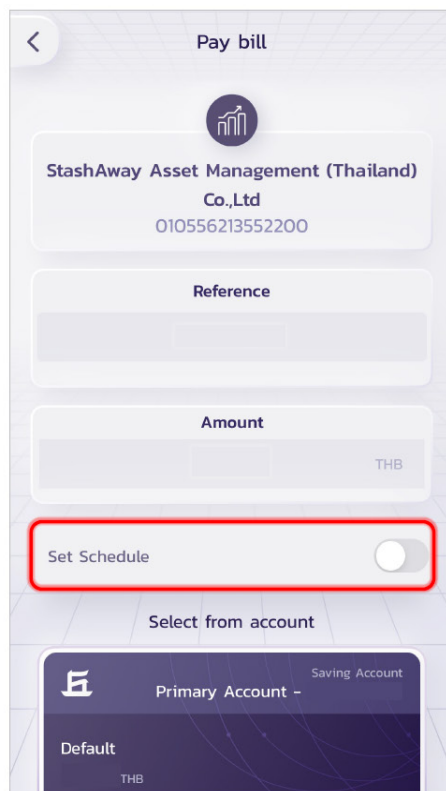
**Step 1:** Log in to KKP Mobile application > Select “Scan” to scan the saved StashAway QR code.

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

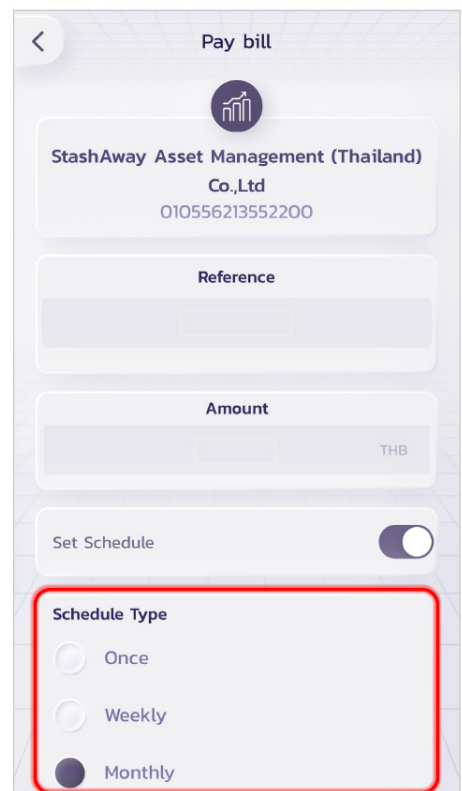
**Step 3:** Select “Monthly”.



(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”.

Pay bill

☐ Weekly

☒ Monthly

Effective Date

31/12/2021

End Date

30/12/2022

Select from account

Primary Account - Default

Next

(4)

Confirm Transaction

KIATNAKIN PHATRA BANK PCL.

Pay bill

StashAway Asset Management (Thailand) Co.,Ltd

010556213552200

Amount

0.00 THB

Fee

0.00 THB

Schedule Type

Monthly

Recurring Time

13 Times

Effective Date

31 Dec 21 - 30 Dec 22

Note

For the months that do not have the 29th, 30th and 31st, the scheduled transaction will be processed on the last day of that month.

Confirm

(5)



### Bank Transfer Scheduling Guide

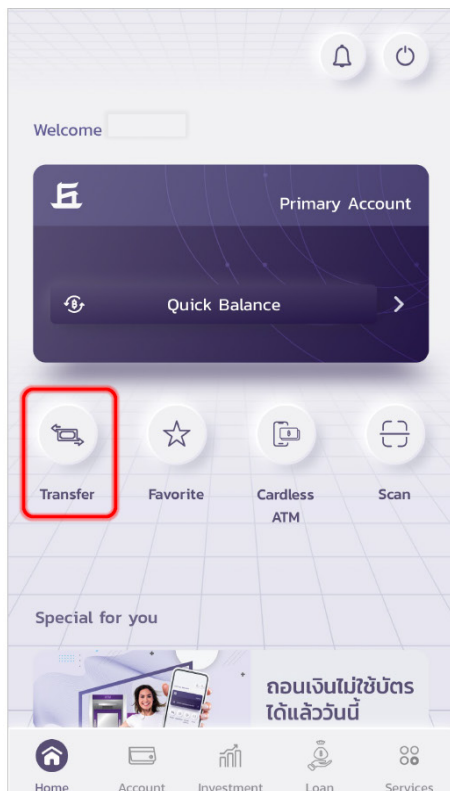
**Step 1:** Log in to KKP Mobile application > Select “Transfer”.

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

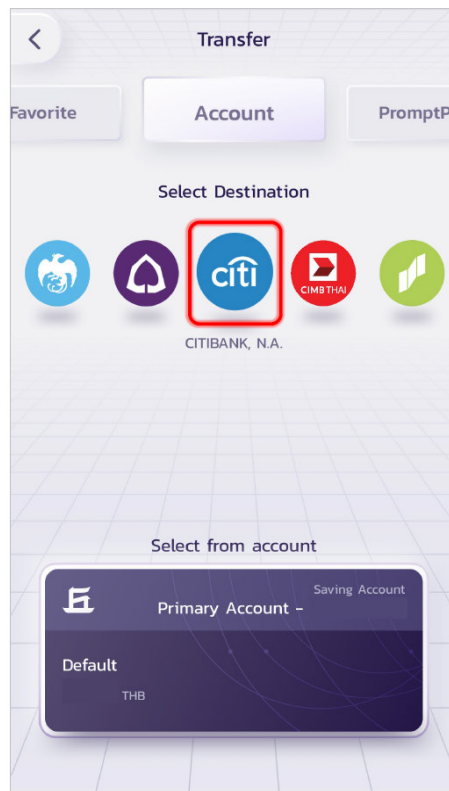
**Step 3:** Enter the recipient’s account number and transfer amount > Click “Set Schedule”.

#### Recipient’s bank account details

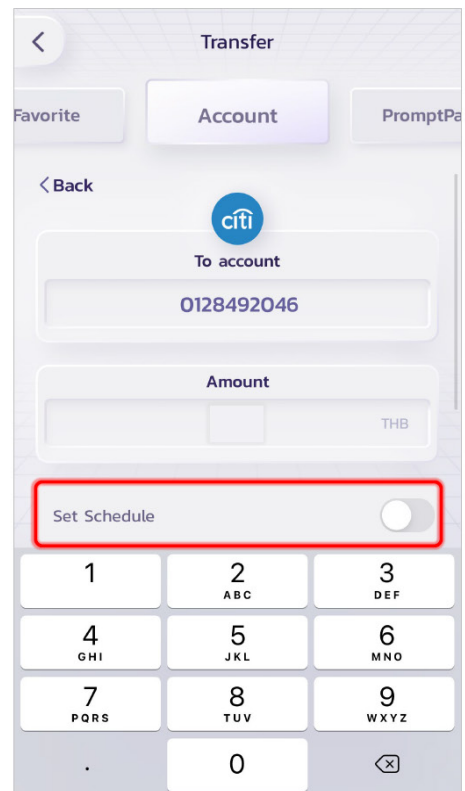
Bank: Citibank  
Account number: 0-128492-046  
Account name: StashAway Asset Management



(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”.

Transfer

Favorite Account PromptPay

Set Schedule ☐

**Schedule Type**

☐ Once

☐ Weekly

☒ Monthly

**Effective Date**

31/12/2021

1 2 3  
4 5 6  
7 8 9  
0

(4)

Transfer

Favorite Account PromptPay

☒ Monthly

**Effective Date**

31/12/2021

**End Date**

30/12/2022

Select from account

Primary Account - Saving Account

Default THB

Next

(5)

Confirm Transaction

KIATNAKIN PHATRA BANK PCL.

STASHAWAY ASSET MANAGEMENT

0128492046

Amount THB

Fee 0.00 THB

Schedule Type Monthly

Recurring Time 13 Times

Effective Date 31 Dec 21 - 30 Dec 22

Note

For the months that do not have the 29th, 30th and 31st, the scheduled transaction will be processed on the last day of that month.

Confirm

(6)





ธนาคารกรุงเทพ

**Bangkok Bank**



## Bank Transfer Scheduling Guide

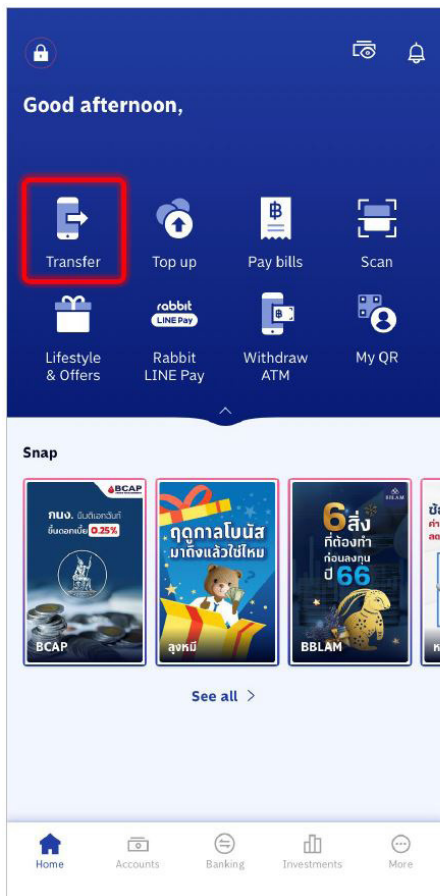
**Step 1:** Log in to BualuangM application > Go to “Home” > Select “Transfer”.

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

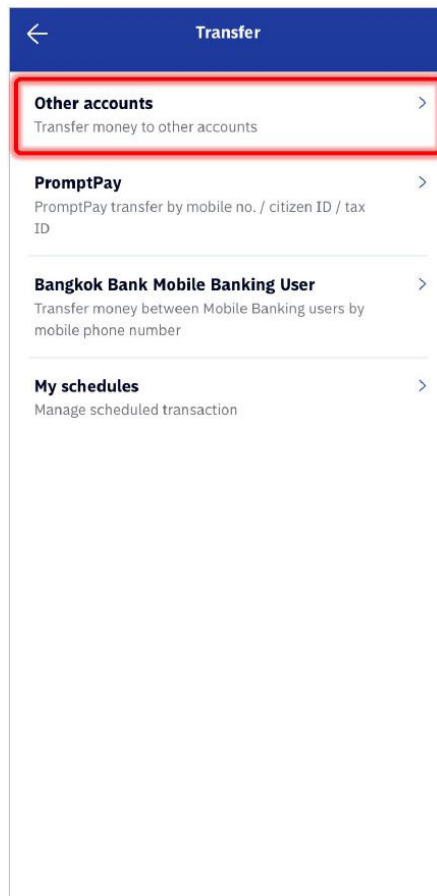
### Recipient’s bank account details

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

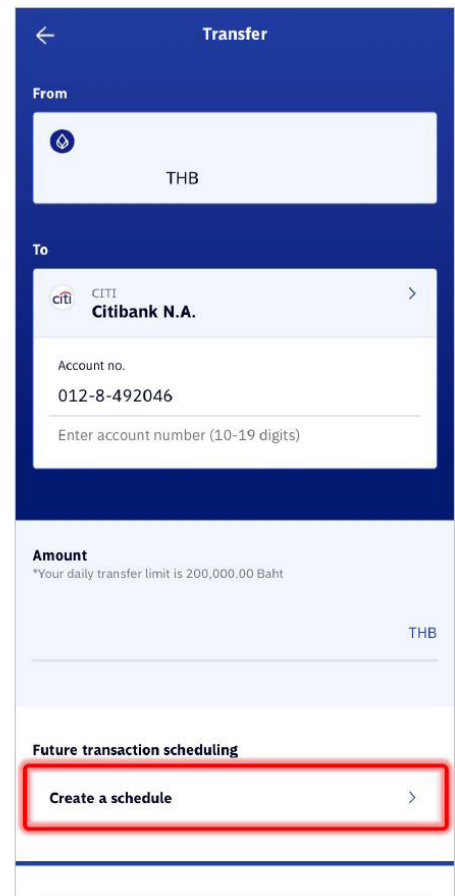
**Step 3:** Select “Create a schedule” to set up recurring transfers.



(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 and click “Next” > Fill in OTP for verification.

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

**Create a schedule**

Once Weekly **Monthly**

Schedule name  
DCA StashAway  
Remaining 17 characters

Transact every  
15

For months that do not have a 29th, 30th or 31st, the transaction will be processed at the end of the month instead

Start  
Feb 2023

End  
Dec 2023

**Remarks**

- The Bank will process the transactions from 06:00 hrs. onwards on the execution date. Please ensure you have sufficient funds in your account
- You can schedule transaction(s) within 12 months
- For weekly and monthly scheduling, you can set up to 12 recurrences per scheduled transaction

**Save**

(4)

**Transfer**

**Category**  
Others

**Note (Optional)**  
Enter note 😊

**Remarks**

- Please enter OTP to confirm your scheduled transfer
- The amount of your scheduled transfers will not combine with daily transfer limits you have set on Mobile Banking
- The Bank's limit for all transfers to other accounts for both Mobile Banking and Bualuang iBanking is 2 million Baht per day per customer

**Next**

Cancel this transaction

(5)

**Review**

Please review transaction details

From

To **STASHAWAY ASSET MANAGEMENT**  
012-8-492046  
Citibank N.A.

Amount THB

Fee 0.00 THB

**Scheduling**

**Schedule name**  
DCA StashAway

**Effective date**  
Every 15th of month  
Feb 2023 - Dec 2023

**Category** Others

**Confirm**

Cancel this transaction

(6)