Efficience
DESIGNED AND DEVELOPED BY THE KEY

Tutorial

Create a New Custodian

contact@thekey.tech +41 22 566 17 33 www.thekey.tech

Do not miss our thematic webinars.

Register now.

Create a New Custodian

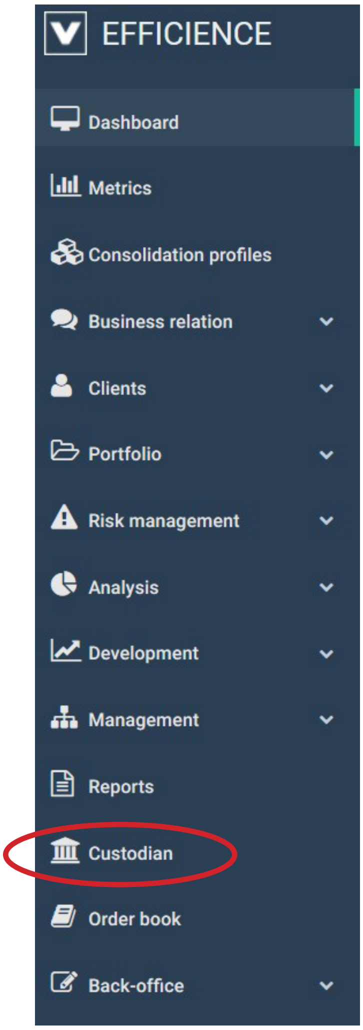
This tutorial is necessary to add new custodian to Efficience. When creating a portfolio, you will be asked to select a custodian, so you have to make sure that you have already added the custodian first, before creating the portfolio.

New Custodian Creation - Overview:

1. Check that the custodian you want to create doesn't already exist.
2. If it is not the case, add a new custodian through the "Custodian" menu.

New Custodian Creation - Details:

1. On the main menu (on the left), click on "Custodian".



2. Then click on "New" at the top right of the list.

3. Fill in the different fields required and suiting your needs. Make sure that the status is "Active" and press "Save".