5 First Digital

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Create New Asset Account

sara li - 2025-06-14 - Asset Account Management

You can now seamlessly create a new Asset Account on the "Asset Holdings" page. Asset Accounts are typically limited to one per asset. If you wish to create another account for the same asset, please reach out to our Customer Service Team via cs@1stdigital.com.

To create an Asset Account:

1. Navigate to the "Asset Holdings" tab on the left panel.

5	Asset Holdings	
Johnasd Doe test Test Complete Custody Users & Client Info	101AL PORTFOLIO VALUE \$10,761,377.63 USD	OVERVIEW BY ASSET CLASSES
Overview Overview Asset Holdings Activity	+ Assets	Hover is see asset type value Crypto Cash NFTs Private equity
INSTRUCTIONS	All Assets & Holdings	Export report +
C OTC	All asset types v \$20.00M	- Hide with balance below 1 USD This Year - 🎝 🗠
🎗 John Test 💌	\$10.00M	

2. Click on the "+ Create account" button.

5	Asset Holdings			
Johnasd Doe test Test Complete Custody	TOTAL PORTFOLIO VALUE	OVERVIEW BY ASSET CLASSES		
Users & Client Info	\$10,761,377.63 USD			
C Overview	4 ASSETS	Hover to see asset type value		
Asset Holdings	+ Create account	Crypto Cash NFTs Private equity		
C Activity				
1↓ Asset Transfer	All Assets & Holdings		Export report	*
С отс	All asset types 👻	Hide with balance below 1 USD This Year ~	.lo 🗠	
_	\$20.00M			
S John Test	\$10.00M			

3. Choose "Cash" or "Crypto" and select the asset currency from the dropdown list.

Create account 🕠	ohnasd Doe test Test	Complete Custody
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4. Click "Create" to complete the process.

5. The corresponding account is created instantly. You can now create instructions for this particular asset in the Client Portal.