

Create New Asset Account

sara li - 2024-10-05 - 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.
2. Click on the "+ **Create account**" button.
3. Choose "**Cash**" or "**Crypto**" and select the asset currency from the dropdown list.
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.