

Exness Account Settings: What to Configure First

Manage Exness account settings, including profile data, verification, security, notifications, trading terminals, payment details, and limits.

Owen Calloway, Senior Editor · 03.04.2026

TL;DR Exness account settings live inside Personal Area and split into profile, security, trading terminal, payment, and notification panels — most traders touch them twice: once after registration to enable 2FA and set the Support PIN, and once a year to refresh verification. Account terms, fees, and country eligibility verified against Exness official pages on 2026-05-20. Profile fields are locked after KYC, so accuracy matters at signup. Payment settings, leverage caps, and notification preferences are the levers most worth setting before the first deposit. CFDs, forex, and crypto CFDs are high-risk products and availability depends on country, entity, verification status, account type, and platform.

Profile and Verification Settings

The profile panel holds the data Exness uses for KYC and AML compliance — most fields are locked after verification, so accuracy at signup is the only easy time to fix them.

Profile data includes full legal name, date of birth, residential address, phone number, email, and country of residence. Broker documentation states that changes to locked fields require a support ticket and document evidence — usually a new ID or address proof showing the updated detail.

Personal data accuracy

- Full name must match the photo ID exactly — middle names, accents, hyphens included
- Date of birth is permanent and locked after KYC
- Residential address must match a current address proof (within six months)
- Country of residence determines the regulating entity and the available products

Document status checks

The verification status panel shows which documents have been accepted, which are pending, and which need resubmission. Expired documents do not auto-renew — Exness may request fresh proofs annually depending on the entity. Common reports note that ignoring an expiry notice causes a sudden withdrawal block on the next payout request.

Region and account limitations

The country of residence on file decides which Exness entity opened the account and which restrictions apply. Restricted countries cannot trade at all. Some products (specific

instruments, leverage levels, account types) are only available to certain regulating entities. Moving country means contacting support, not editing the profile field.

Fix any profile errors before KYC completes — afterwards every correction is a support ticket with a document attached.

Security Settings

Enable authenticator-app 2FA, set a Support PIN, review active sessions, and use a generated password at the 15-character cap — those four steps cover the realistic threat model for a retail trading account.

Phishing is the dominant risk for retail trading accounts. The security panel exposes the controls that defend against it.

Password and two-factor checks

- Password policy is 8 to 15 characters with upper, lower, digit, and special — use a manager-generated 15-character string
- 2FA via authenticator app (Google Authenticator, Authy) is more reliable than SMS
- SMS 2FA is exposed to SIM-swap attacks and should be a fallback only
- Backup codes should be stored offline somewhere outside the trading device

Support PIN role

The Support PIN is a separate code Exness asks for during live chat or phone support to confirm account ownership. Setting it once after registration means a future urgent support case (locked login, missing withdrawal) does not pause while it is created. Broker documentation states the PIN lives inside the Security panel.

Device and session hygiene

1. Open Personal Area Settings → Security
2. Review the list of active sessions and the device on each one
3. Revoke any session that looks unfamiliar or runs on a device the trader no longer uses
4. Confirm the email and phone on file are both reachable
5. Test the 2FA backup channel before relying on it

Authenticator-app 2FA plus Support PIN plus a 15-character generated password covers the realistic security threats — set them all at registration.

Trading Terminal Settings

The trading terminal panel controls which MT4 or MT5 accounts are linked, the default platform for new accounts, and access to the WebTerminal and Exness Trade app — most of which is set at account creation and rarely changed.

The terminal binding is decided when the trading account is opened. Switching an MT4 account to MT5 or vice versa is not supported — the alternative is to open a new account on the desired platform.

Default terminal choices

- MT4 — for older Expert Advisors and traders accustomed to the MT4 ecosystem
- MT5 — for the broader instrument list and newer EA tooling
- Exness Trade app — MT5 only, mobile-first
- WebTerminal — browser MT4 or MT5 without install
- Exness Terminal — browser MT5 launched from Personal Area

MT4 and MT5 account links

Each trading account has its own number, server, and trading password. The Personal Area lists every account with the connection details. Changing the trading password is done from the account card, not from the main security panel — and the trading password is independent of the Personal Area password.

WebTerminal and app preferences

The published policy is that any MT4 or MT5 account can connect through WebTerminal in a browser. The Exness Trade app only accepts MT5 accounts. Mobile and desktop sessions can run simultaneously, but trading on multiple devices at once requires care because orders sent from one device are visible on the other after a short delay.

Choose the terminal at account creation — switching later means opening a new account on the desired platform.

Payment and Withdrawal Settings

Saved payment methods, name-matching status, and any per-method limits all live in the payment settings panel — verify these before the first deposit so the first withdrawal does not surprise.

Payment method storage and the same-method rule together decide which payouts are even possible. The same-method withdrawal rule is the single most common reason a withdrawal is rerouted or rejected.

Saved method checks

- Saved cards display only the last four digits — confirm the bank and country match the trader
- Saved e-wallets show the wallet account or email — must match the verified name
- Crypto addresses are stored per network — sending USDT TRC20 to an ERC20 address loses the funds
- Removing a saved method does not delete the historical transactions tied to it

Name matching on payment accounts

Broker documentation states the name on the payment account must match the verified name on the trading account. A withdrawal request to a card or wallet held by anyone else is rejected. Joint accounts, family-member cards, and business accounts all fall foul of this rule. Common reports note this is the leading cause of rejected withdrawals.

Limits shown in Personal Area

Limit	Where shown	Set by
Per-deposit minimum	Deposit screen	Method + region
Per-deposit maximum	Deposit screen	Method + KYC status
Per-withdrawal limit	Withdrawal screen	Method + KYC + entity
Leverage cap	Account settings	Entity + instrument

Set the payment methods and confirm name-matching status before the first deposit — fixing it after a rejected withdrawal is slower.

Notification Settings

Default notification settings are usually noisy; the useful set is withdrawal confirmations, security alerts, and trade execution receipts — marketing emails and app push for promo content can be turned off.

Notifications matter for security and for record keeping. A withdrawal confirmation that never arrives is the first sign of a phishing breach or a misrouted account. Setting up a separate folder filter for broker emails makes them easy to audit.

Trade and balance alerts

- Trade execution receipts — useful for record keeping but can be reduced to summary form
- Balance threshold alerts — set a low-water mark notification before margin call
- Margin call email — keep on; it is the only warning before automatic position closure
- Daily summary email — optional, useful for journaling

Security message preferences

- New device login alerts — keep on
- Password change confirmations — keep on
- 2FA changes — keep on; any alert here without trader action is a red flag
- Withdrawal confirmation emails — keep on; filter to its own folder

App push notification checks

The Exness Trade app sends push notifications for trade events, deposit confirmations, and marketing content. Marketing push can be disabled from the app settings without affecting trade or security notifications. Disable lock-screen previews on shared devices.

Keep security and withdrawal notifications on, trim marketing and noisy trade pings — the useful alerts then stand out.

When Settings Cannot Be Changed

Some settings are locked by design — country of residence, date of birth, the platform binding on a trading account — and the only path to change them is opening a new account or escalating to support with documentation.

Locked settings exist for compliance and platform reasons. Treating them as fixed at account creation prevents the most common "I cannot change this" support ticket.

Platform linked to account

- MT4 accounts cannot become MT5 accounts; open a new MT5 account instead
- Account currency is set at creation and is permanent
- Account type (Standard, Pro, Raw Spread, Zero) cannot switch — open a new account
- Server selection at creation is permanent for that account

Country or entity restrictions

The country on the verified profile determines the regulating entity. Moving country requires support contact, evidence of the new residence, and may involve closing the existing account and opening a new one under a different entity. The published policy is that this is not a self-service change.

When to create a new account

If a trader needs a different account type, currency, or platform, opening a new trading account from the Personal Area is faster than waiting for any kind of conversion. The existing account can be left open or closed depending on the funds inside. Each trader can hold multiple trading accounts under one Personal Area, subject to entity limits.

Some settings are permanent — set them right at registration and open new accounts rather than fight the lock.

FAQ

Can I change my Exness account currency after opening?

No. Account currency is set at creation and is permanent. The path to a different account currency is opening a new trading account in the desired currency and moving funds via the Personal Area or a withdrawal and redeposit cycle.

How do I reset my Exness password?

For the Personal Area password, use the "I forgot my password" link on the sign-in page; the reset email arrives within a couple of minutes. For the trading-account password (used by MT4 or MT5), reset it from the account card inside Personal Area — that is a separate string from the Personal Area login.

Can I lower the leverage cap on my account?

Yes. Personal Area account settings expose a leverage selector with the available levels for the regulating entity. Lowering leverage is one of the cheapest risk-management settings, particularly for newer traders. The cap can be raised again later if needed.

Why are some profile fields greyed out?

KYC-relevant fields lock after verification because they tie the account to a specific identity. Changing them requires a support ticket with a new ID or address proof. Date of birth and full legal name are typically permanent absent legal documentation of a change.

Full article: <https://exbroker.online/exness-settings>

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