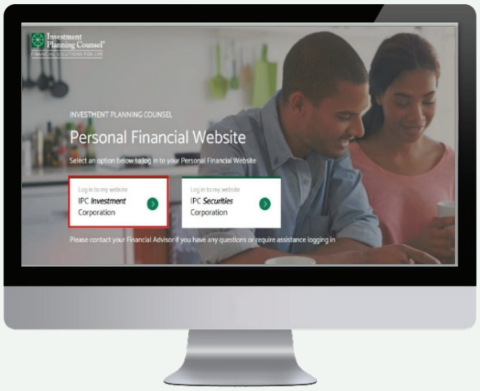
Personal Financial Website

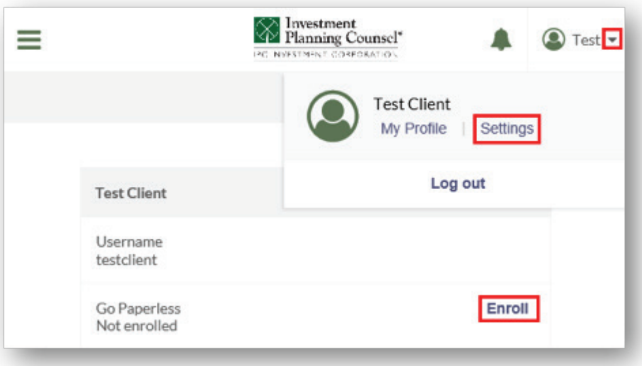
CLIENT REGISTRATION GUIDE

Your **Personal Financial Website** provides you with a digital solution to viewing your account information and activity. Whether from your desktop, smartphone or tablet, view quarterly statements and communicate with your Advisor with greater flexibility. Your Personal Financial Website is your next step in client account access.

HOW TO REGISTER:

1. An email with registration instructions will be sent to you by your Advisor Office.
2. Click on the enclosed link and follow the steps to complete setup.
3. To register you will need to provide the following:
   a. Last 3 Digits of SIN
   b. Date of Birth
   c. Last Name
4. Create a username and password.
5. Answer 3 security questions.





IF YOU HAVE NEVER ENROLLED FOR eDELIVERY, NOW IS THE TIME TO START RECEIVING ONLINE STATEMENTS

To enroll in eDelivery:

1. Click on the dropdown menu beside your name on the top right-hand corner then select Settings.
2. Under **Go Paperless**, select **Enroll**.
3. A disclaimer will appear; select **Continue** and **Agree**.

FAMILY LINKING – *SHARING YOUR ACCOUNT*

Family linking allows you to share account information with family members.

WHAT YOU NEED:

The email address of the person with whom you wish to share your account information.

HOW TO SHARE:

1. From the home screen, select the (link) button.
2. Enter the email address of the family member you would like to share with.
3. Your investment portfolio details will appear on your family member's profile.

For more information, please contact your Advisor.

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