

Investor Portal guide

# Account sharing

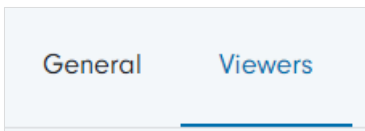
## 1 How to share accounts

### Sending the invitation

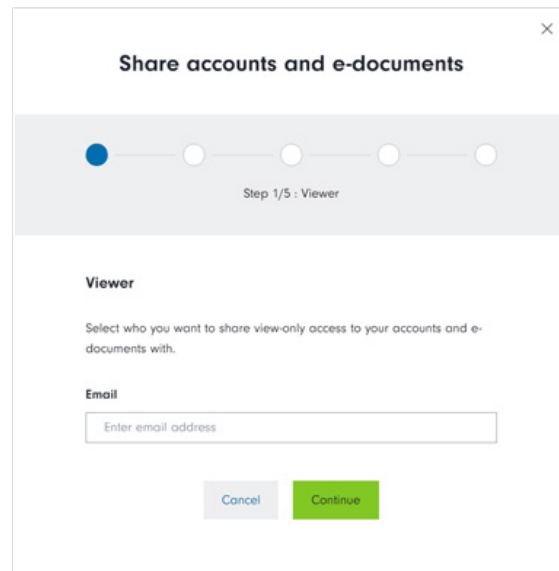
- Log in to **Investor Portal**
- Go to **Profile** at the top right corner of the website



- Under **Profile** click on **Viewers**



- Enter the email address of the person you wish to share the account information with and select if that person is a new or existing viewer. Click **Continue**.



There are some cases when you'll need help setting up account sharing.

- The viewer must already be registered in Investor Portal. If the viewer isn't already registered, you'll see the error message "**No user with this email address exists.**"
- The viewer has access to another account. If this is the case, you'll see the error message "**Account access cannot be shared with this email address as it is associated with multiple users.**"

Contact your advisor or the Manulife Wealth support team for assistance in adding these viewers.

- Click **Share accounts and e-documents**
- Click the arrow to expand the information and select the accounts and e-documents you want to share. Once selected, click **Continue**.

- Once the accounts have been chosen, you'll need to choose a security question. The person you're inviting will need to answer this question. Never share your security answer by email, text, or social media.

**Share accounts and e-documents**

Step 2/5 : Access

**Access**

Select the accounts and e-documents you want to share. You can only share accounts that the user does not already have access to.

**Accounts belonging to**

**DAVID ADAMS**  
ID [redacted] 2/2 accounts selected - 3/3 e-documents selected

**Accounts**

- All
- SPOUSAL RRSP
- RRSP

**E-documents**  
Requires access to all accounts

- All
- Tax Documents
- Statements
- Confirms

[Back](#) [Continue](#)

**Share accounts and e-documents**

Step 3/5 : Security question

**Security question**

The security question and answer must be unique. Never share your security answer by email, text, or social media.

**Security question**  
Enter a security question with up to 40 characters.

**Security answer**  
8 to 25 characters, without symbols or spaces

**Confirm security answer**  
Re-enter security answer

[Back](#) [Continue](#)

Please note: Select only the accounts and document types you wish to share with the person you're inviting to share access.

- Review the information in the invitation template. If changes are needed, click **Back** to make them.
- To complete the invitation, accept the terms and conditions. Once the invitation template is final, click **Send invitation**.

**Share accounts and e-documents**

Step 4/5 : Review

**Review**

Please carefully review the invitation details.

**Share with**  
sarah.kuypers@hotmail.com

**Sharing view-only access to**

**DAVID ADAMS**  
ID

**Accounts**  
SPOUSAL RRSP  
RRSP

**E-documents**  
Tax Documents  
Statements  
Confirms

**Security question**  
What is my favourite colour?

**Security answer**  
Bluegreen

I authorize and agree to allow this individual to view the details of the selected account(s) (including holdings and account activities) and/or any selected document(s) for all my accounts (including joint accounts). I acknowledge I have obtained joint account owner consent to share any details or documents of any shared joint accounts. I understand that I can modify or remove account or document access for this individual at any time.

[Back](#) [Send invitation](#)

- You may close the window or create a new invitation to share information with another person.

**Share accounts and e-documents**

Step 5/5 : Completed!

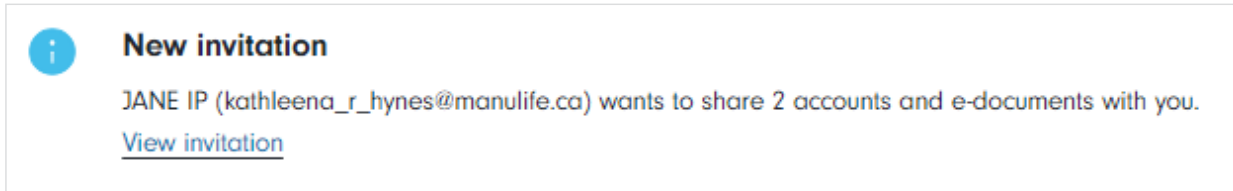
An invitation has been sent to the investor portal account of **Sarah Byron** (sarah.kuypers@hotmail.com). You can manage this invitation from the viewers profile page or in your viewer history.

[Close](#) [Share more](#)

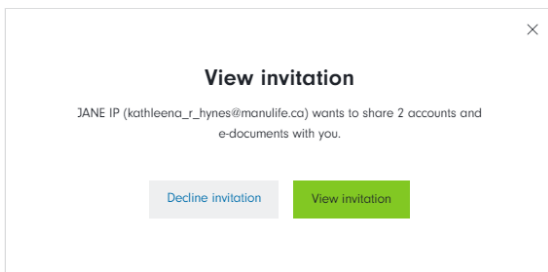
- In the **Viewer** menu, you'll now be able to see who you have invited to view your accounts and the status of the invitation.

## 2 How to accept an invitation for accounts shared with you

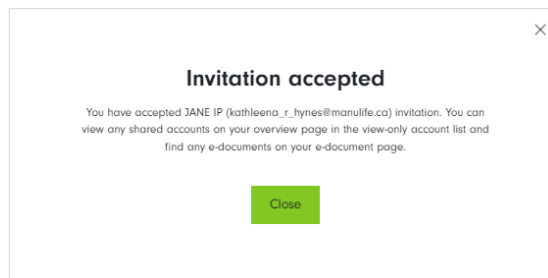
- Log in to Investor Portal and look for a new invitation notice at the top of your dashboard. Click **View invitation** to review the details.



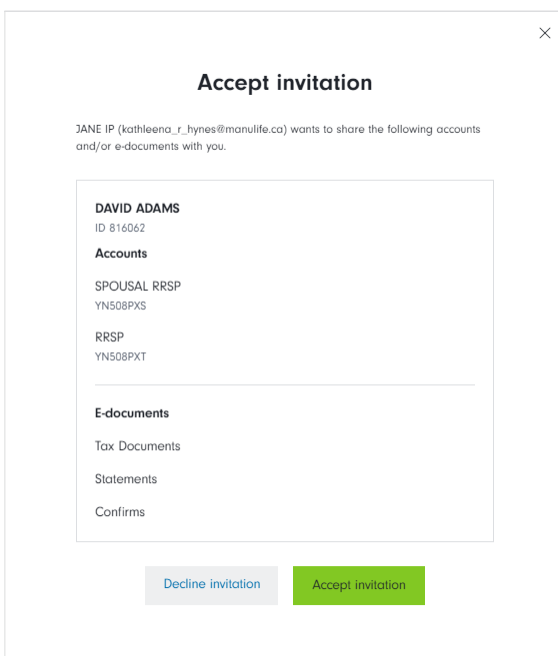
- Decline or view the invitation.



- If the invitation is accepted, the below screen will appear with a confirmation.



- Answer the security question that was set up by the client who sent the invitation. Click **Continue**.
- The invitation details will be displayed, including the accounts and/or e-documents that were shared. You can either decline or accept the invitation.



### 3 Viewing accounts/e-documents that have been shared with you

- You may now view account(s) that have been shared. Accounts are found in your dashboard under **View Only Accounts** information.

View Only Accounts ⓘ				
<b>RRSP</b> [Progress Bar]	ADAMS DAVID <small>Account Name</small>	\$978,673.58 <small>Market Value</small>	CAD <small>Account Currency</small>	>
<b>SPOUSAL RRSP</b> [Progress Bar]	ADAMS DAVID <small>Account Name</small>	\$45,780.68 <small>Market Value</small>	CAD <small>Account Currency</small>	>

- Clicking **Accounts**, **Holdings**, **Activity**, or **E-documents** on the main menu will also show the shared account(s) in each area to view information pertaining to the shared account(s).

#### Accounts

<b>RRSP</b> ADAMS DAVID <small>Account Name</small> \$978,673.58 <small>Market Value</small> CAD <small>Account Currency</small>	<b>CASH</b> HARPER GREGORY <small>Account Name</small> \$748,294.49 <small>Market Value</small> CAD <small>Account Currency</small>	<b>RRSP</b> YN41FKST HARPER GREGORY <small>Account Name</small> \$104,163.22 <small>Market Value</small> CAD <small>Account Currency</small>
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#### Holdings

### Filter by

<b>Account</b>	<b>Asset Class</b>	<b>Security</b>
All ▾	All ▾	Keyword
<b>Apply</b>	<b>Clear all</b>	

## Activity

### Filter by

<b>Account</b>	<b>Transaction Type</b>	<b>Security</b>
<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="Keyword"/>

**Date Range**

Last 30 Days  Year to Date

## E-documents

### Filter by

**Account**  JOHN RRSP  JANE RRSP  J/J CASH  J/J CASH

**Document Name**

**Document Type**  Account Documents  Confirms  Statements  Tax Documents

**Account Name**

**Tax Form**  1042  1099  CR  EVCC  NR4

**Tax Year**  2022  2023

**Date Range**  Last 30 Days  Year to Date