Manulife Wealth

Investor Portal guide

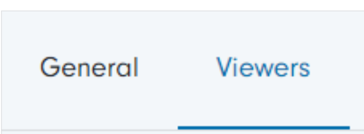
Account sharing

1 How to share accounts

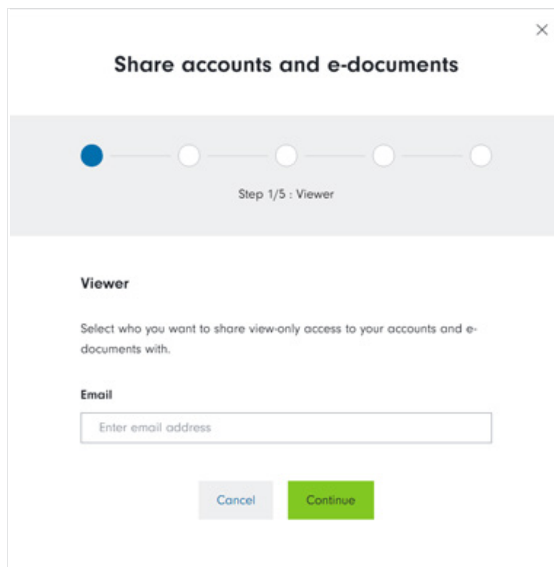
Sending the invitation

- 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**.

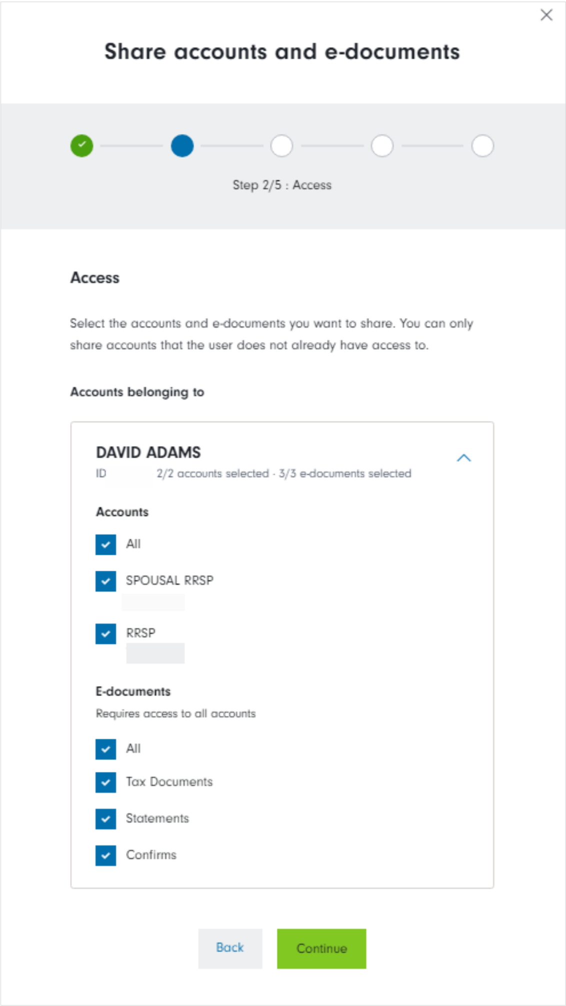


There are some cases when you'll need help setting up account sharing.

- 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**."

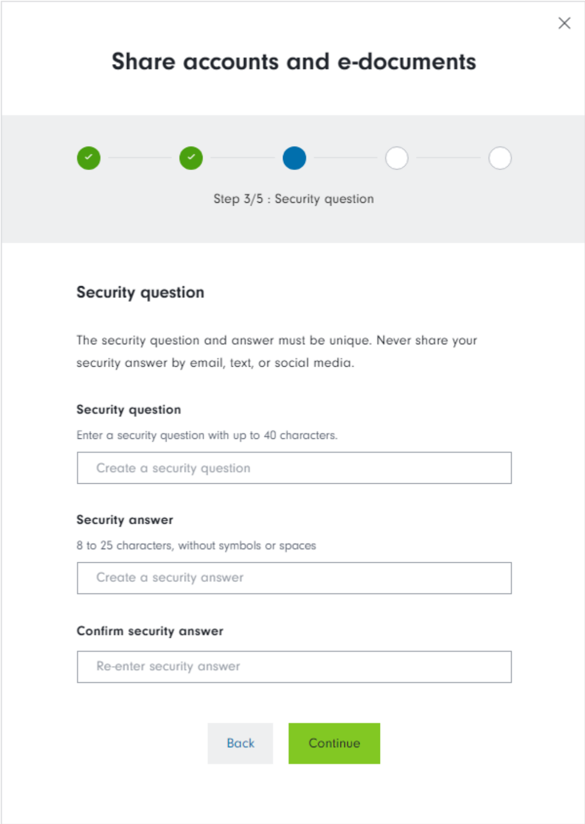
Contact your advisor or the Manulife Wealth support team for assistance in adding these viewers.

- 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**.

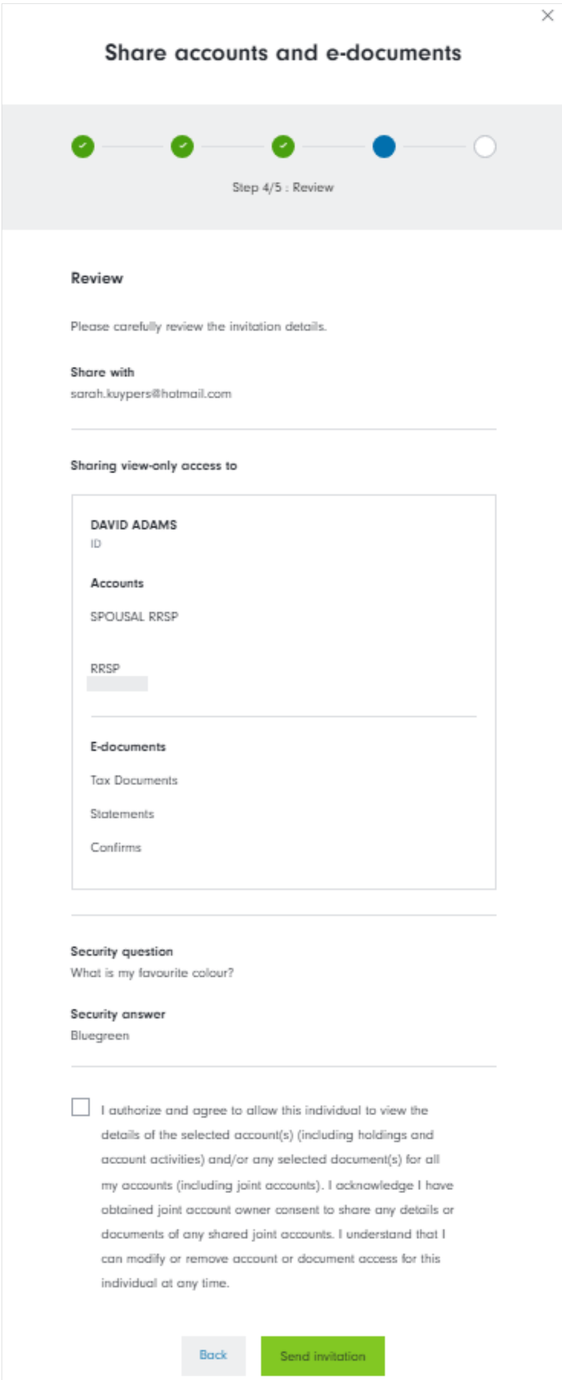


Please note: Select only the accounts and document types you wish to share with the person you're inviting to share access.

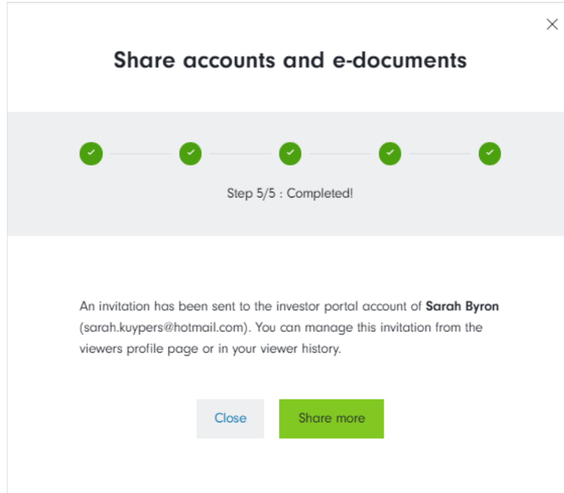
- Once the accounts have been chosen, you'll need to choose a security question. The person you're inviting will need to answer this question. Never share your security answer by email, text, or social media.



- 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**.



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

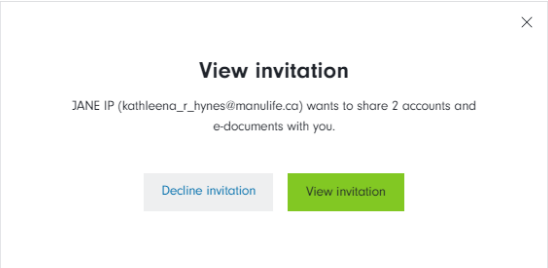


- In the **Viewer** menu, you'll now be able to see who you have invited to view your accounts and the status of the invitation.

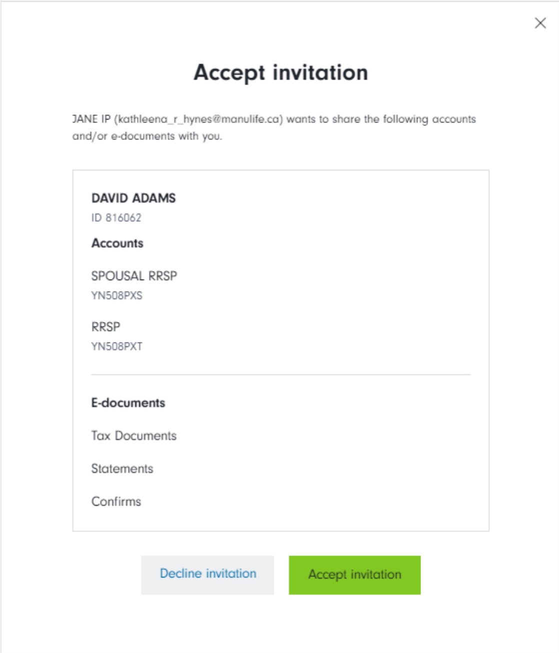
2 How to accept an invitation for accounts shared with you

- 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.

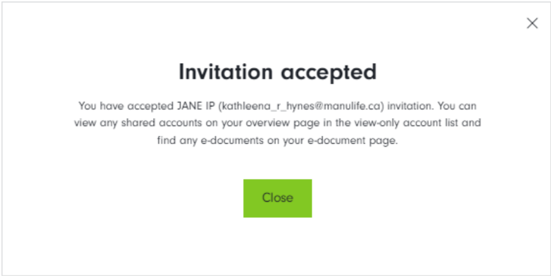
- Decline or view the invitation.



- 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.

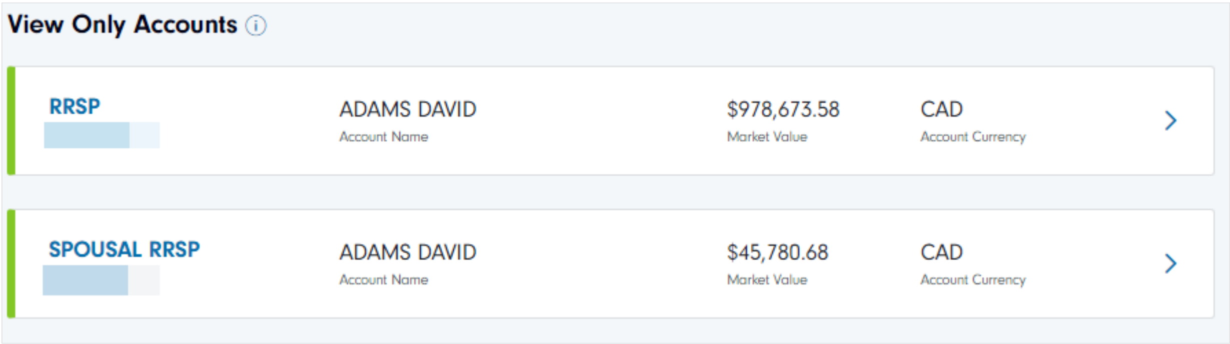


- If the invitation is accepted, the below screen will appear with a confirmation.



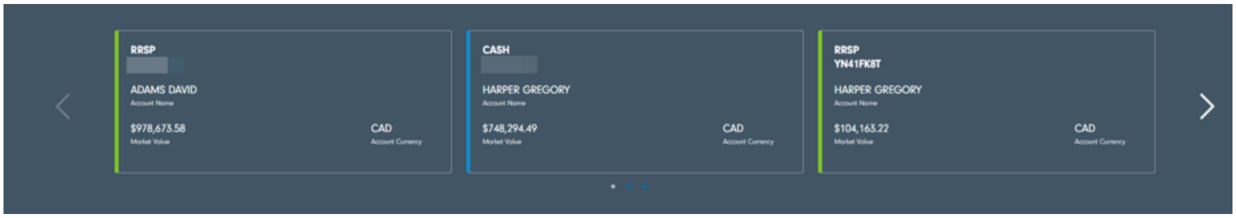
3 Viewing accounts/e-documents that have been shared with you

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

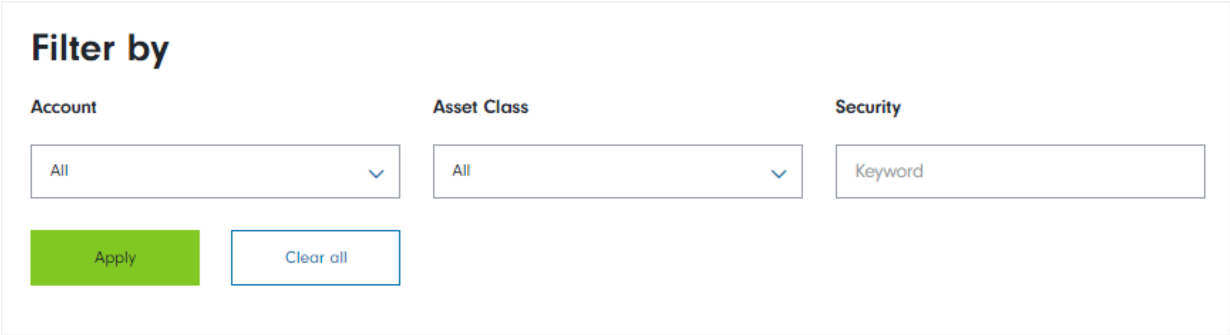


- Clicking **Accounts**, **Holdings**, **Activity**, or **E-documents** on the main menu will also show the shared account(s) in each area to view information pertaining to the shared account(s).

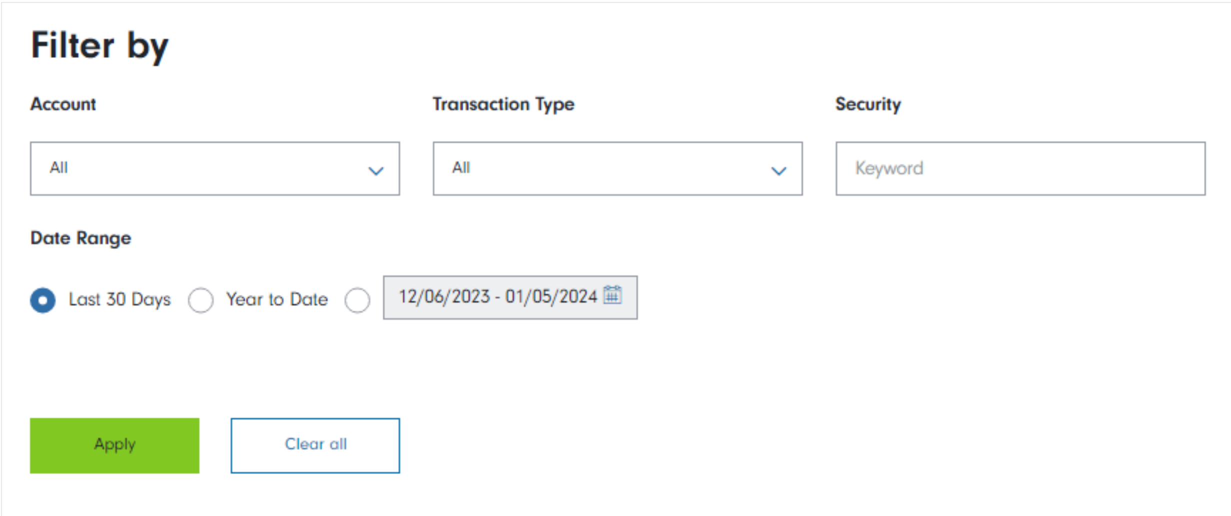
Accounts



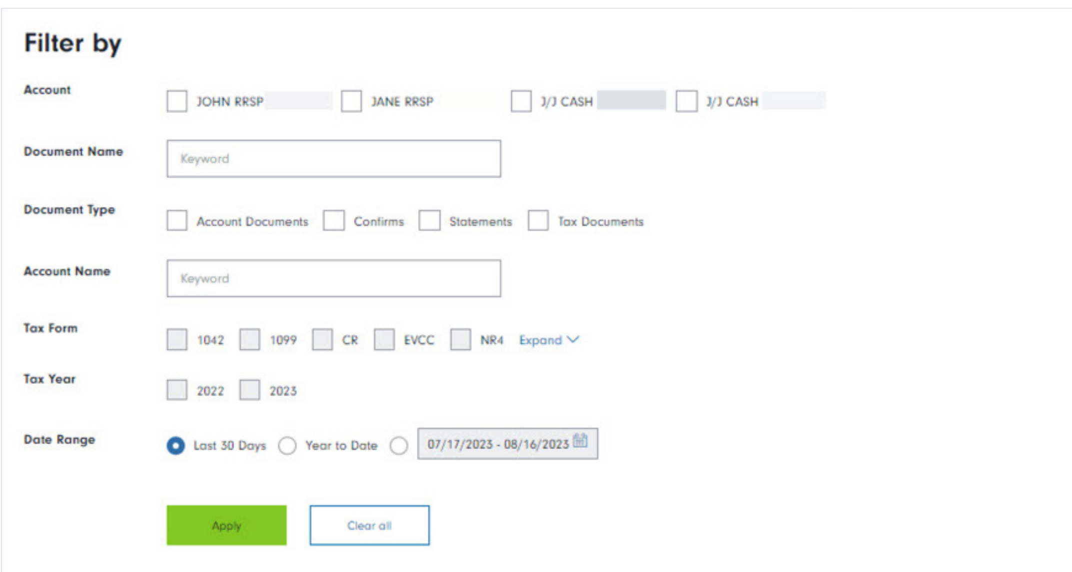
Holdings



Activity



E-documents



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