

## Investor Portal guide

# Navigation outline


## 1 General navigation and tips/tricks

When you initially log in to Investor Portal, you'll see a welcome message. This message is a guide that will show you key features on the website. You can choose to view the guide by clicking **Show me now!** If you don't wish to view the guide right away, select **Maybe later**, and you'll be prompted on your next visit.


✕

### Welcome to your Investor Portal!

**Market Value & Net Invested Capital**



**Account Allocation**



- Nonregistered
- Registered Education
- Registered Income
- Registered Savings
- Tax Free Savings

Check your portfolio performance, take a deep dive into activities and holdings across your accounts and more...

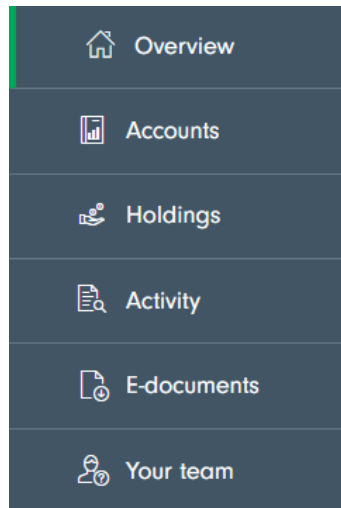
**Let us show you around!**

Click below to get a short tour of your new portal.

Maybe later Show me now!

## 2 Reporting and performance information

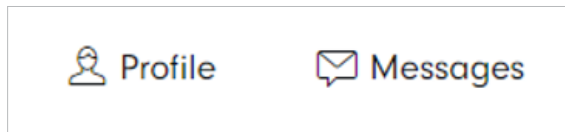
- When you log in to Investor Portal, you'll land on the main **Portfolio Summary** page. This page will provide you with the current market value of your accounts, including your account cash balances. You'll have the ability to alter the dates, which will provide you with historical portfolio information.
- On the left side of the page is a navigation bar, which allows you to look at your **Accounts**, **Holdings**, **Activity**, and **E-documents** in further detail.



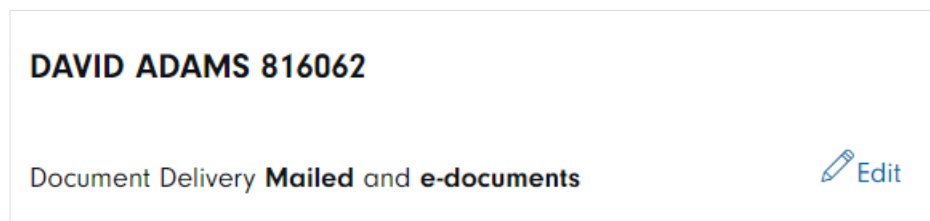
- In the **Accounts** tab, you can select an account to see the balance and performance information specific to that account.
- The **Holdings** tab will provide a list of your holdings. You can filter by account, asset type, or specific holding you wish to review.
- The **Activity** tab will show you the transactions made in your portfolio. You can filter this to the account, transaction type, or holding.
- The **E-documents** tab will allow you to see any document pertaining to your accounts. You can view these documents per account, document or account name, document type (account documents, confirms, statements, tax documents), tax forms, and tax year.

### 3 Enrolling for and viewing e-documents online

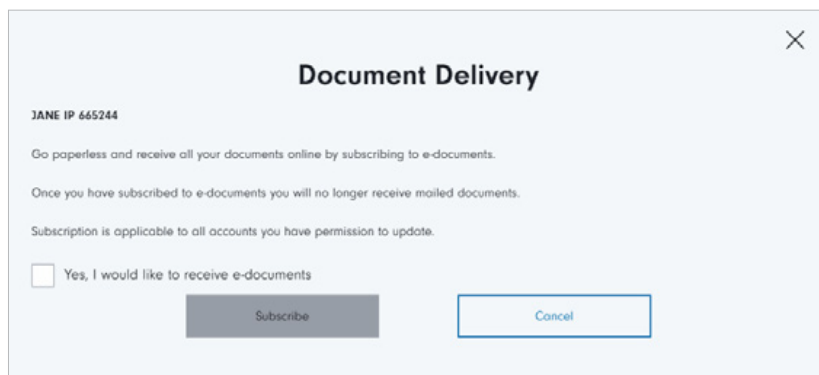
- You can change your delivery preference to e-documents during your registration or later through Investor Portal.
- When you log in to Investor Portal, select the **Profile** button at the top right corner.



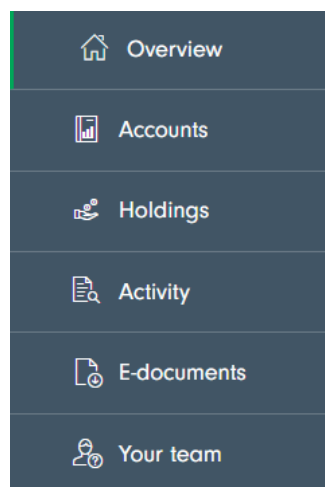
- Scroll to the bottom of the profile page. You'll see the **Client Preferences** section. Under your name and client ID, you'll show what your current preference for document delivery is. If you have not yet set your preference to e-document delivery only, you can do it now. To change your preference, select **Edit**.



- From there, you will be given the option to select e-documents.



- Your selection will be applied to the delivery of future documents we issue to you.
- To view your documents, select **E-documents** from the navigation bar.
- You can filter the documents you see by changing any of the **Filter by** options.



### Filter by

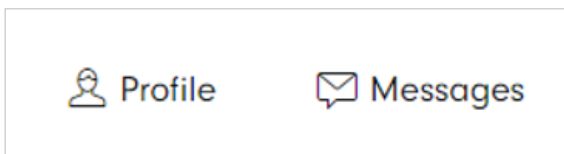
<b>Account</b>	<b>Document Name</b>	<b>Document Type</b>
<input type="text" value="All"/>	<input type="text" value="Keyword"/>	<input type="text" value="All"/>
<b>Account Name</b>	<b>Tax Form</b>	<b>Tax Year</b>
<input type="text" value="Keyword"/>	<input type="text" value="All"/>	<input type="text" value="All"/>

**Date Range**

Last 30 Days
  Year to Date

## 4 Updating your profile

- Select the **Profile** button at the top right corner.



- The only information you'll be able to update in Investor Portal is your mobile number. You'll also need to contact your advisor to update your mobile number. Any other information will need to be updated with your advisor.

**Note:** The display name you chose during registration is permanent and cannot be changed in your profile or by your advisor.

Display Name <b>JANE</b>	<a href="#">Edit</a>	Username
First Name <b>JANE</b>	Last Name <b>IP</b>	
Email	Mobile <input type="text"/>	<a href="#">Edit</a>
Appearance <input checked="" type="radio"/> Light <input type="radio"/> Dark		

Please contact your Advisor to change your personal information.

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