

Investor Portal guide

Registering for the Manulife Wealth Investor Portal

Investor Portal gives you access to your Manulife Wealth account information and documents like your statements online.

To register for Investor Portal, email manulifewealthsupport@manulife.ca or reach out to your advisor.

You'll receive a registration invitation through email. This will include two steps to complete the registration process.

- Note: The link in the registration email expires after 48 hours, at which time you'll need to request a new link.
- Investor Portal is supported in the following browsers: Google Chrome, Microsoft Edge, Apple Safari, and Firefox.



Manulife Wealth

Step 1: Setting up a Manulife ID

Note: If you already have a Manulife ID, please proceed to Step 2: Complete the Investor Portal registration.

Manulife ID is our secure login to access Manulife's different client online portals. If you don't already have a Manulife ID, you'll need to set one up to complete your Investor Portal registration.

In the email, under **Step 1**, click the link, **Create a new Manulife ID**. The following **Set up your Manulife ID** page will open.

Let's	set up your single, secure ID. Learn	more about your Manulife ID
Plea Firs	ie fill out everything. name	
Las	name	
Date Day	of birth (dd) Month	Year (yyyy)
Ema	Select	*
Lan	guage for email	

Fill out the required information and click **Continue**. You'll then get an email to activate your Manulife ID by clicking on the link in that email.

Note: This link will stay active for 15 minutes.

Once you've clicked the email link to activate your Manulife ID, select **Sign in**.

After signing in, add your mobile number and select **Continue**. You'll then get a one-time code to your mobile number. Enter the code and click **Continue**.

Note: Click **Don't have a mobile number** to see other options.

Hi Alesia!	Let's	add	а	mo	bile
number to	your	Man	ul	ife l	D

Why add a mobile number?

We use this mobile number to keep your Manulife ID secure. So we'd only use it for things like texting you a one-time code. With your permission, we may use it for other purposes.

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Cod	
Get	a new code if needed
	Continue
Di	dn't get the code?
Che	k your mobile number—and make sure you've picked the right country code!
lf 28 skip	9-439-6782 isn't right, you can go back and add a different mobile number. Or you ca this step for now and do it later.
	Go back
_	

Your Manulife ID is now set up.

Return to the Manulife Wealth Investor Portal registration email and continue to Step 2.

Step 2: Complete the Investor Portal registration

To complete this step, you must have a Manulife ID. If you don't have a Manulife ID, please see Step 1.

In the email, under **Step 2**, select **Sign up for the Manulife Wealth Investor Portal**.

1 When you click this link, the following **Register Now** page will open.

We'll send a verification code to the mobile number added to your profile during registration.

Enter the verification code and click **Next**.



Note: This code is active for 15 minutes. If you're unable to access it or get an error when entering it, please contact your advisor or call Manulife Wealth support at 800-361-3119.

Register Now verification code without a mobile number.

If your mobile number isn't in your profile, get a verification code from your advisor or Manulife Wealth support at 800-361-3119.

Enter the verification code and click **Next**.

	Register Now
• • •	Step 1/6 : Account Verification
Account Verificat	ion
Vorification code	

Note: This code is active for 24 hours. If you get an error when entering it, please contact your advisor or call Manulife Wealth support at 800-361-3119.

2 Click **Sign In with Manulife**. Use your Manulife ID to login.

	Register Now
0	Step 2/6: Manulife sign in
This step Investor F	is essential to link your accounts and provide you with access to the Manulife Portal.
Personal ⁷ Sp	onsors Advisors
	<i>Sign in</i> with your Manulife ID
	Please fill out everything.
	Username
	Remember username
	Forsol your username?
	Password
	SHOW ForRot your password?
	Sign in

3 Once you've signed in with your Manulife ID, continue with registration by entering your date of birth and the last four digits of your Social Insurance Number (SIN).

Note: If you don't have a SIN, click **I do not have a** Social Insurance Number. Your account access will be restricted until your advisor confirms your identity with us.

	Registe	r Now
0	Step 3/6: Client	- O O O
Client Ve	rification	
Verify your	date of birth and last four digit	ts of your Social Insurance Number.
This inform documents	tion is required to validate aw and enable self-serve options.	mership of your accounts, access
Please con enter it bel	act yaur advisor if you do not i w.	have your information or cannot
Date of Bir	h	

4 Review the Terms of Use, Disclaimer Notice, and

Privacy Policy. After reviewing, check the box to accept the Terms and Conditions and have read the Privacy Policy, then continue.

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Step 4/6: Term	s of Use. Discloimer Notice.	Privacy Policy
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5 Choose documents to get your Manulife Wealth documents online, including statements, trade confirmations, and tax receipts. Access them anytime on the Manulife Wealth Investor Portal. To subscribe, select **Yes, I would like to receive E-documents** and click **Subscribe**.

Register Now
•-•-•-•
Step 5/6: Go Green
Go Green Go paperless and receive all your documents online by subscribing to e-
documents. Once you have subscribed to e-documents you will no longer receive mailed documents.
Subscription is applicable to all accounts you have permission to update. Yes, I would like to receive e-documents
Subscribe

Your registration is complete, and you now have access to the Manulife Wealth Investor Portal.

Learn more about the Investor Portal features in the **Navigation outline** and **Account sharing** guides.



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