

# Account sharing

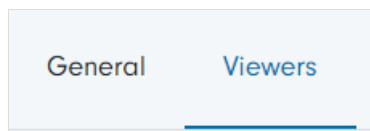
## 1 How to share accounts view access

### Sending the invitation

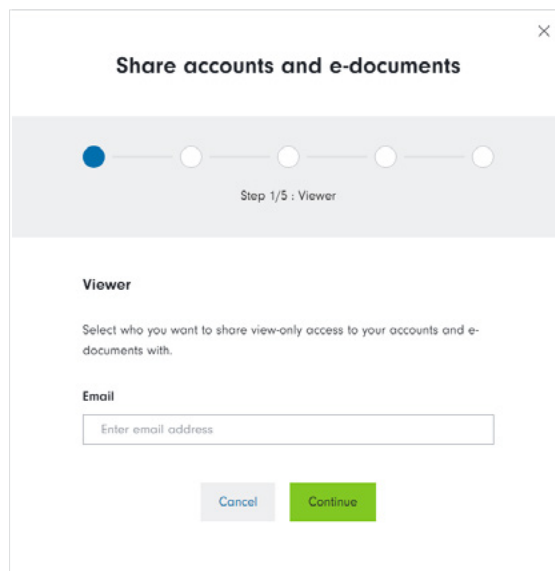
- Log in to the Manulife Wealth **Investor Portal**.
- Go to **Profile** at the top right corner of the homepage.



- Under **Profile**, click **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**.



In some cases, when you may need help setting up account sharing.

- **Viewer registration:** The viewer must be registered in the Investor Portal. If not, you'll see the error message, "**No user with this email address exists.**"
- If the viewer has access to another account, 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 help.

- Click **Share accounts and e-documents**.
- Click the arrow to expand the information and choose the accounts and e-documents you want to share. Once selected, click **Continue**.
- After selecting the accounts, choose a security question. The invitee will need to answer this question. Never share your security answer via 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

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.

Create a security question

Security answer

8 to 25 characters, without symbols or spaces

Create a security answer

Confirm security answer

Re-enter security answer

Back

Continue

Note: Select only the accounts and document types you want to share.

- Review the information in the invitation template. If changes are needed, click **Back** to edit.
- Accept the terms and conditions to complete the invitation. When ready, 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

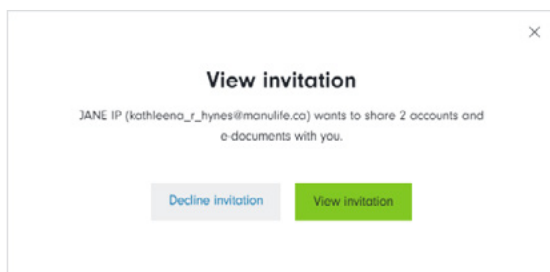
- In the **Viewer** menu, you can see who you've invited and the status of each invitation.

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

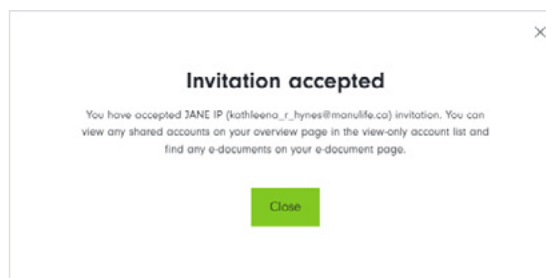
- Log in to Investor Portal and look for a new invitation notice at the top of your dashboard. Click **View invitation** to review the details.



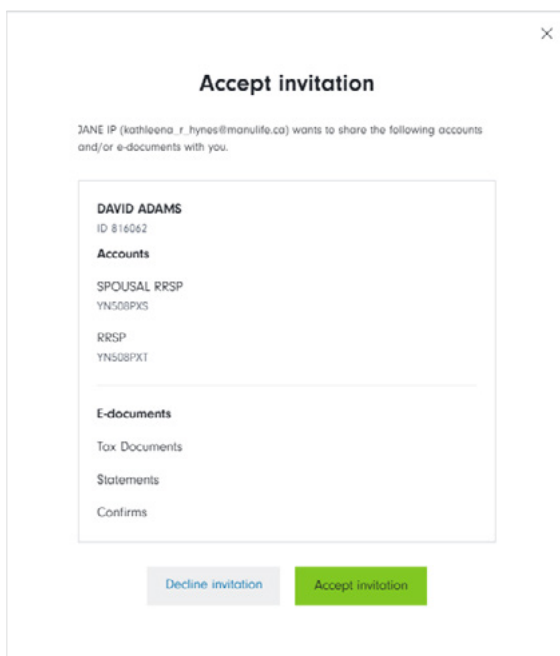
- Choose to view or decline the invitation.



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



- Answer the security question set by the sender. Click **Continue**.
- Review the invitation details, including the shared accounts and/or e-documents. Choose to accept or decline the invitation.



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

- You can now view the shared account(s) in your dashboard under **View Only Accounts**.

View Only Accounts ⓘ				
<div>RRSP</div> <div></div>	ADAMS DAVID <small>Account Name</small>	\$978,673.58 <small>Market Value</small>	CAD <small>Account Currency</small>	>
<div>SPOUSAL RRSP</div> <div></div>	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** in the main menu will display information related to the shared account(s).

#### Accounts

<div>RRSP</div> <div></div> <div>ADAMS DAVID <small>Account Name</small></div> <div>\$978,673.58 <small>Market Value</small></div> <div>CAD <small>Account Currency</small></div>	<div>CASH</div> <div></div> <div>HARPER GREGORY <small>Account Name</small></div> <div>\$748,294.49 <small>Market Value</small></div> <div>CAD <small>Account Currency</small></div>	<div>RRSP YN41FKBT</div> <div></div> <div>HARPER GREGORY <small>Account Name</small></div> <div>\$104,163.22 <small>Market Value</small></div> <div>CAD <small>Account Currency</small></div>
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#### Holdings

Filter by

Account

Asset Class

Security

All

All

Keyword

Apply

Clear all

## Activity

### Filter by

Account

Transaction Type

Security

All

All

Keyword

Date Range

☒ Last 30 Days

☐ Year to Date

☐ 12/06/2023 - 01/05/2024

Apply

Clear all

## E-documents

### Filter by

Account

Document Name

Document Type

Account Name

Tax Form

Tax Year

Date Range

☐ JOHN RRSP

☐ JANE RRSP

☐ 1/1 CASH

☐ 1/1 CASH

Keyword

☐ Account Documents

☐ Confirms

☐ Statements

☐ Tax Documents

Keyword

☐ 1042

☐ 1099

☐ CR

☐ EVCC

☐ NR4

Expand

☐ 2022

☐ 2023

☒ Last 30 Days

☐ Year to Date

☐ 07/17/2023 - 08/16/2023

Apply

Clear all