Manulife Wealth

Investor Portal guide

Navigation outline

1 General navigation and tips/tricks

On your first login to the Investor Portal, you'll see a welcome message guiding you through key features. Choose **Show me now!** to view it or Maybe later to be reminded next time.



Let us show you around!

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



Show me now!

2 Reporting and performance information

After logging in, you'll see the **Portfolio Summary** page. This shows your accounts' current market value and cash balances. Change the dates to see historical data.

Use the left navigation bar to view Accounts, Holdings, Activity, and E-documents in detail.

公 Overview				
Accounts				
ᢞ Holdings				
a Activity				
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- Accounts tab: Select an account to see its balance and performance.
- Holdings tab: View a list of your holdings. Filter by account, asset type, or specific holding.
- Activity tab: See transactions in your portfolio. Filter by account, transaction type, or holding.
- **E-documents** tab: View documents related to your accounts. Filter by account, document name, document type (e.g., statements, tax documents), tax forms, and tax year.

3 Enrolling for, and viewing, E-documents online

You can switch to e-documents during registration or any time later on the Investor Portal.

Log in and click the **Profile** button at the top right.

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Scroll to the **Client Preferences** section at the bottom. Under your name and client ID, you'll see your current document delivery preference. Click **Edit** to change it to E-documents.



From there, you can select E-documents. Your choice will apply to all future documents.

Document Delivery					
JANE IP 665244					
Go paperless and receive all your documents online by	ubscribing to e-documents.				
Once you have subscribed to e-documents you will no lo	ger receive mailed documents.				
Subscription is applicable to all accounts you have perm	ision to update.				
Yes, I would like to receive e-documents					

To view your documents, select **E-documents** from the navigation bar. You can filter the documents by changing any of the **Filter by** options.



	Document Name	Docun	nent Type
All	✓ Keyword	All	~
Account Name	Tax Form	Tax Ye	ar
Keyword	All		

4 Updating your profile

Click the **Profile** button at the top right corner.



You can update your mobile number here. For other updates, please contact your advisor.

Note: The display name you chose during registration is permanent and can't be changed.

Display Name	JANE ØEd	Username
First Name	JANE	Last Name IP
Email		Mobile (i
Appearance	Light Dark	
Please contact	your Advisor to change your personal information	m.

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