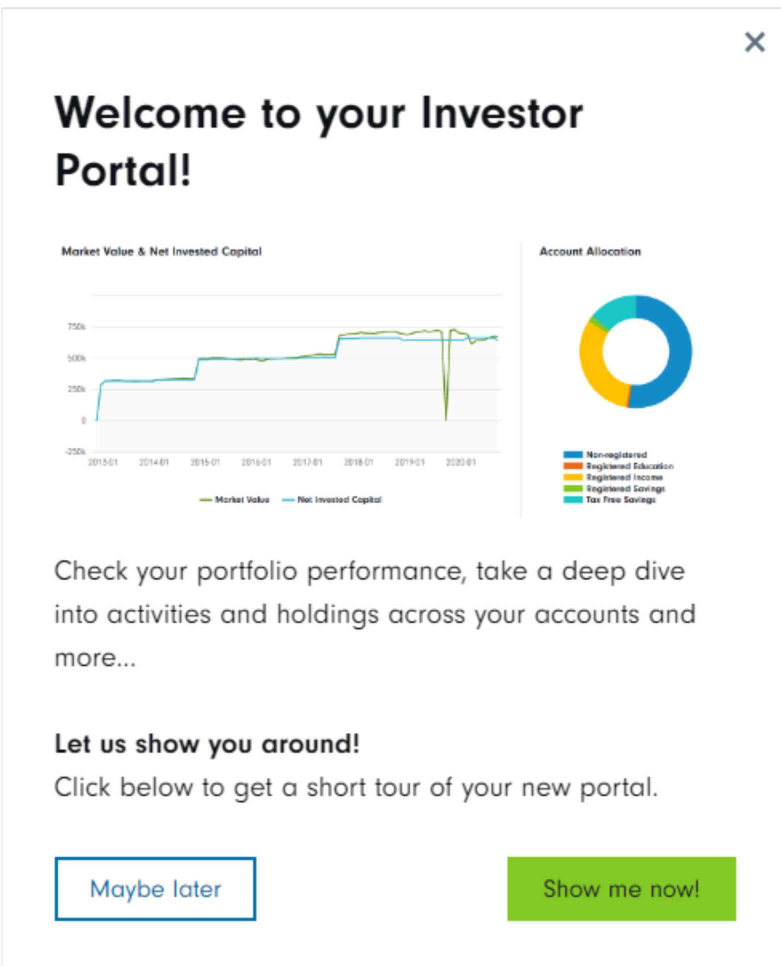
Investor Portal guide

Navigation outline

1 General navigation and tips/tricks

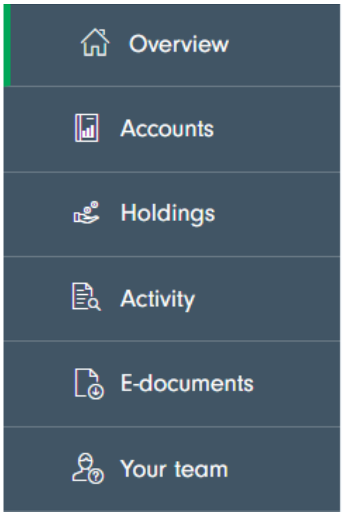
On your first login to the Investor Portal, you'll see a welcome message guiding you through key features. Choose **Show me now!** to view it or Maybe later to be reminded next time.



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.



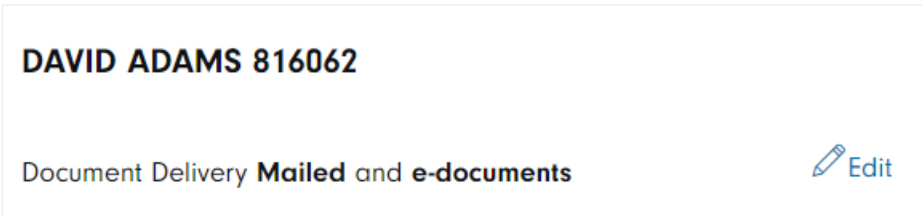
- **Accounts** tab: Select an account to see its balance and performance.
- **Holdings** tab: View a list of your holdings. Filter by account, asset type, or specific holding.
- **Activity** tab: See transactions in your portfolio. Filter by account, transaction type, or holding.
- **E-documents** tab: 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

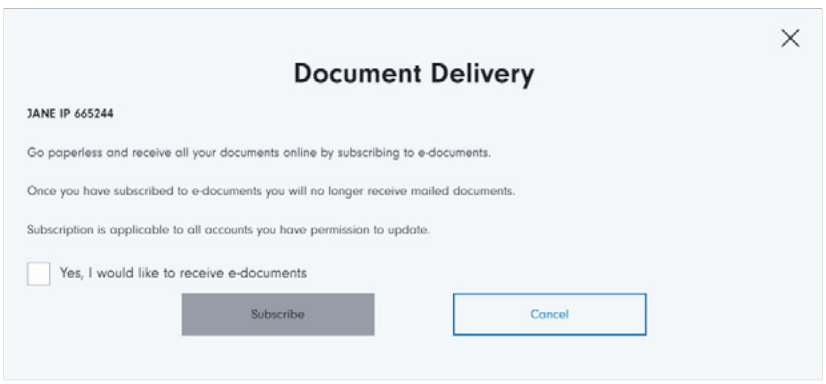
You can switch to e-documents during registration or any time later on the Investor Portal.

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

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.

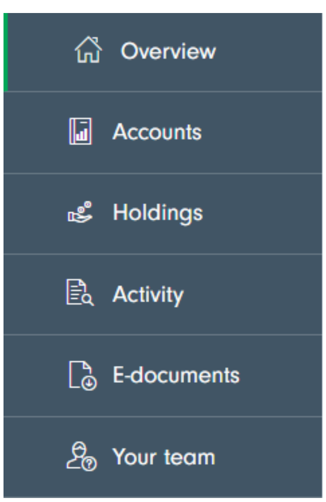


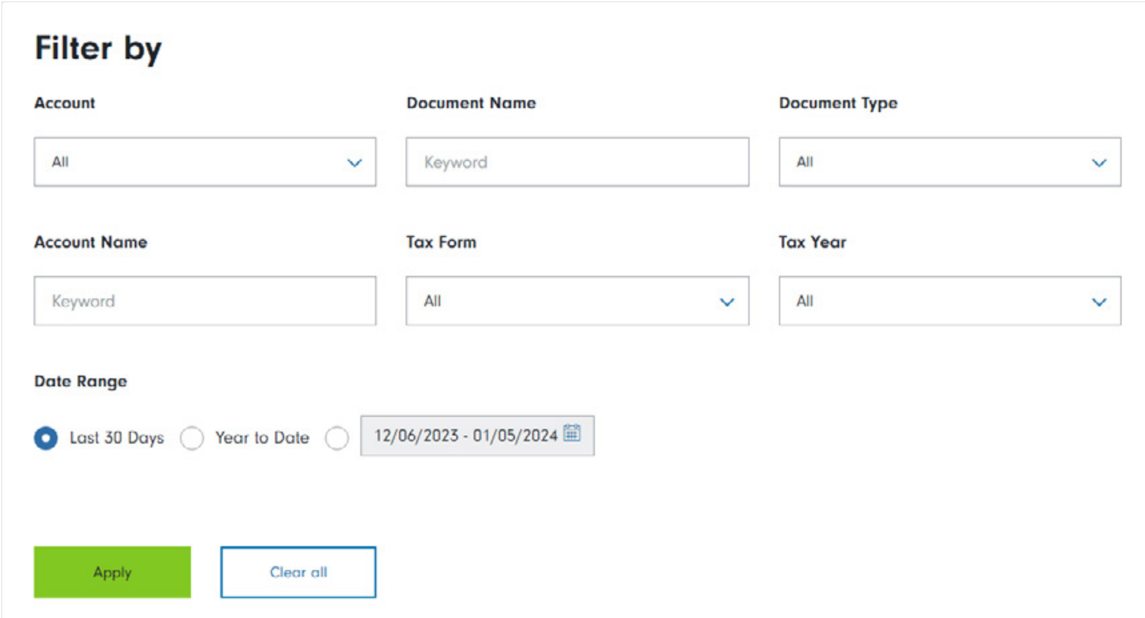
From there, you can select E-documents. Your choice will apply to all future documents.



To view your documents, select **E-documents** from the navigation bar.

You can filter the documents by changing any of the **Filter by** options.



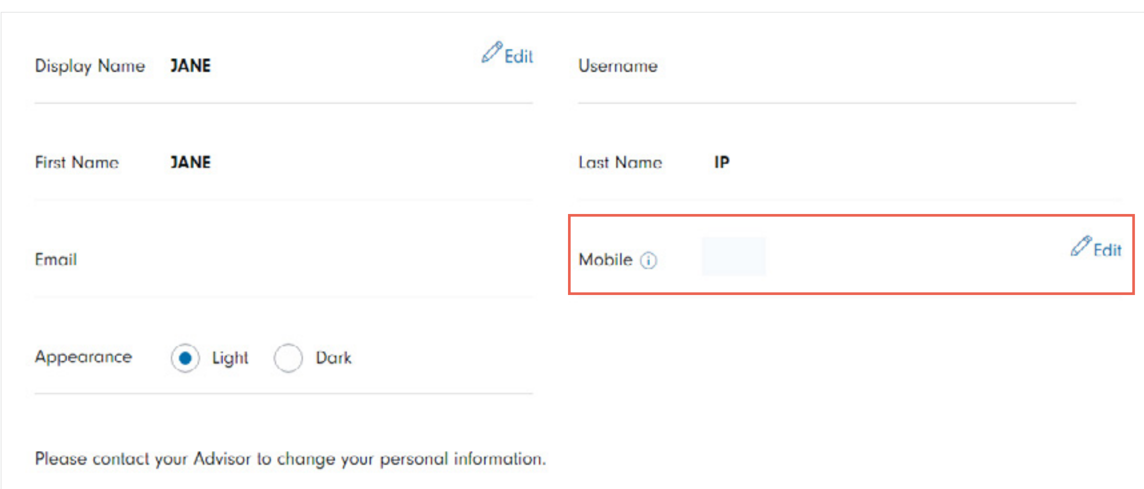


4 Updating your profile

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.



Manulife, Manulife & Stylized M Design, Stylized M Design and Manulife Wealth are trademarks of The Manufacturers Life Insurance Company and are used by it, and by its affiliates under license.

CRINV-10498 11/24