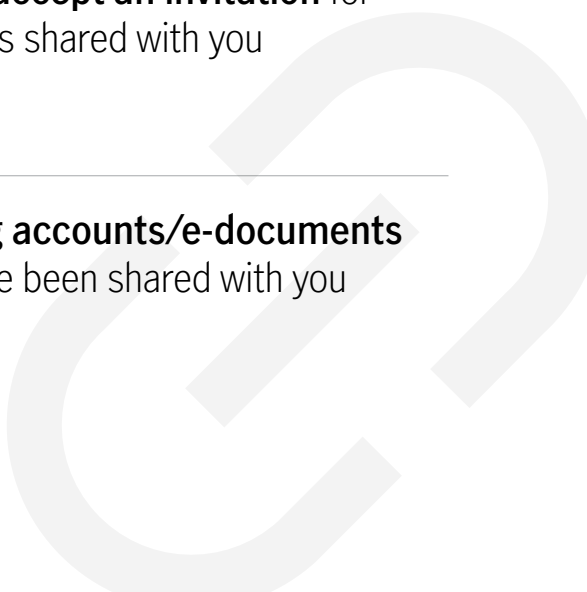


Investor Portal account sharing *guide*

1 How to **share accounts view**
access

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

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

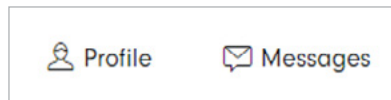


1

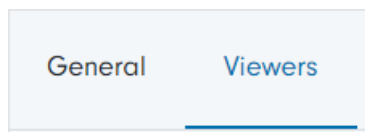
How to share accounts view access

Sending the invitation

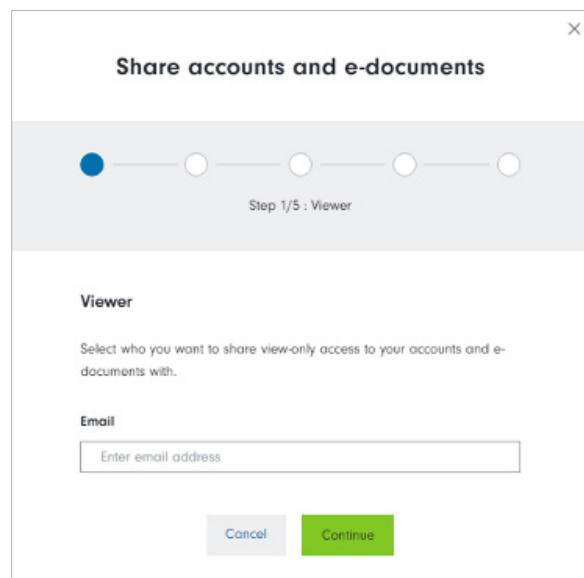
- ① Log in to the Manulife Wealth **Investor Portal**.
- ② Go to **Profile** at the top right corner of the homepage.



- ③ Under **Profile**, click **Viewers**.



- ④ 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**. *Note:* The viewer must be registered for Investor Portal; otherwise **No user with this email address exists** appears. Each email can access only one account.

A screenshot of the 'Share accounts and e-documents' dialog box. The dialog has a title bar with a close button (X). Below the title bar is a progress indicator with five steps, the first of which is filled with a blue circle. Below the progress indicator is the text 'Step 1/5: Viewer'. The main content area is titled 'Viewer' and contains the text 'Select who you want to share view-only access to your accounts and e-documents with.' Below this text is an 'Email' label and a text input field with the placeholder text 'Enter email address'. At the bottom of the dialog are two buttons: 'Cancel' and 'Continue'.

- ② Click **Share accounts and e-documents**.
- ③ Click the arrow to expand the information and choose the accounts and e-documents you want to share. Once selected, click **Continue**.

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

- 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.

The screenshot shows a dialog box titled "Share accounts and e-documents" with a close button (X) in the top right corner. Below the title is a progress indicator with five circles: the first two are green with checkmarks, the third is blue, and the last two are white. Below the progress indicator, it says "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.

Security answer

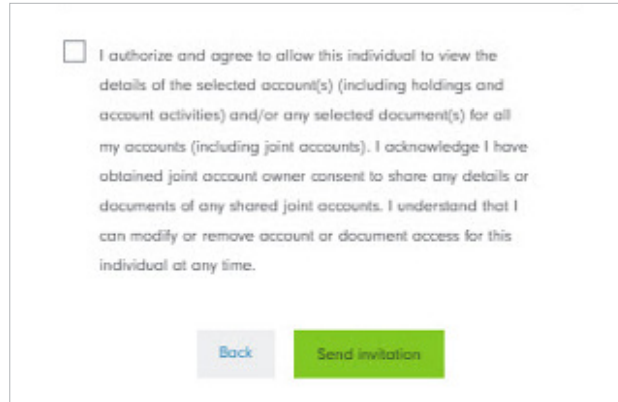
8 to 25 characters, without symbols or spaces

Confirm security answer

- Review the information in the invitation template. If changes are needed, click **Back** to edit.



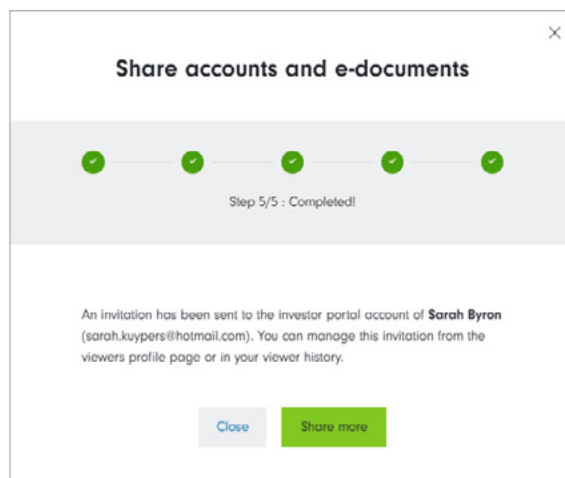
- Accept the terms and conditions to complete the invitation. When ready, click **Send invitation**.



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 [X]

Step 5/5 - Completed!

An invitation has been sent to the investor portal account of **Sarah Byran** (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.



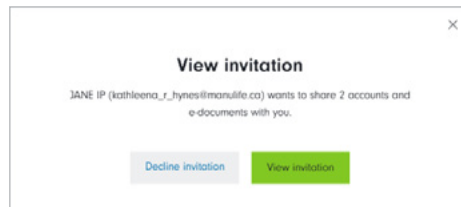
2

How to accept an invitation for accounts shared with you

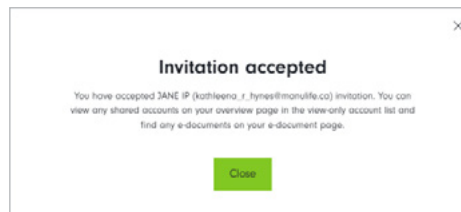
- ① Log in to Investor Portal and look for a new invitation notice at the top of your dashboard. Click **View invitation** to review the details.



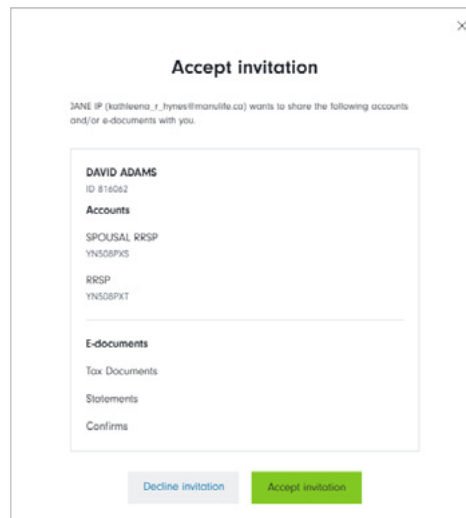
- ② Choose to view or decline the invitation.



- ③ If the invitation is accepted, a confirmation screen will appear.



- ④ Answer the security question set by the sender. Click **Continue**.





- ⑤ 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

- ③ You can now view the shared account(s) in your dashboard under **View Only Accounts**.



View Only Accounts ⓘ				
RRSP 	ADAMS DAVID <small>Account Name</small>	\$978,673.58 <small>Market Value</small>	CAD <small>Account Currency</small>	>
SPOUSAL RRSP 	ADAMS DAVID <small>Account Name</small>	\$45,780.68 <small>Market Value</small>	CAD <small>Account Currency</small>	>

- ③ Clicking **Accounts**, **Holdings**, **Activity**, or **E-documents** in the main menu will display information related to the shared account(s).

Accounts

RRSP  ADAMS DAVID <small>Account Name</small> \$978,673.58 <small>Market Value</small> CAD <small>Account Currency</small>	CASH  HASPER GREGORY <small>Account Name</small> \$746,294.49 <small>Market Value</small> CAD <small>Account Currency</small>	RRSP TN1PKBT HASPER GREGORY <small>Account Name</small> \$104,163.22 <small>Market Value</small> CAD <small>Account Currency</small>
---	--	--

Holdings

Filter by		
Account	Asset Class	Security
All 	All 	Keyword
Apply	Clear all	

Activity

Filter by

Account	Transaction Type	Security
<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="Keyword"/>

Date Range

Last 30 Days Year to Date

E-documents

Filter by

Account	<input type="checkbox"/> JOHN RRSP <input type="checkbox"/> JANE RRSP <input type="checkbox"/> J/J CASH <input type="checkbox"/> J/J CASH
Document Name	<input type="text" value="Keyword"/>
Document Type	<input type="checkbox"/> Account Documents <input type="checkbox"/> Confirms <input type="checkbox"/> Statements <input type="checkbox"/> Tax Documents
Account Name	<input type="text" value="Keyword"/>
Tax Form	<input type="checkbox"/> 1042 <input type="checkbox"/> 1099 <input type="checkbox"/> CR <input type="checkbox"/> EVCC <input type="checkbox"/> NR4 Expand
Tax Year	<input type="checkbox"/> 2022 <input type="checkbox"/> 2023
Date Range	<input checked="" type="radio"/> Last 30 Days <input type="radio"/> Year to Date <input type="text" value="07/17/2023 - 08/16/2023"/>



Manulife, Manulife and 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.

MW 1144972 04/26