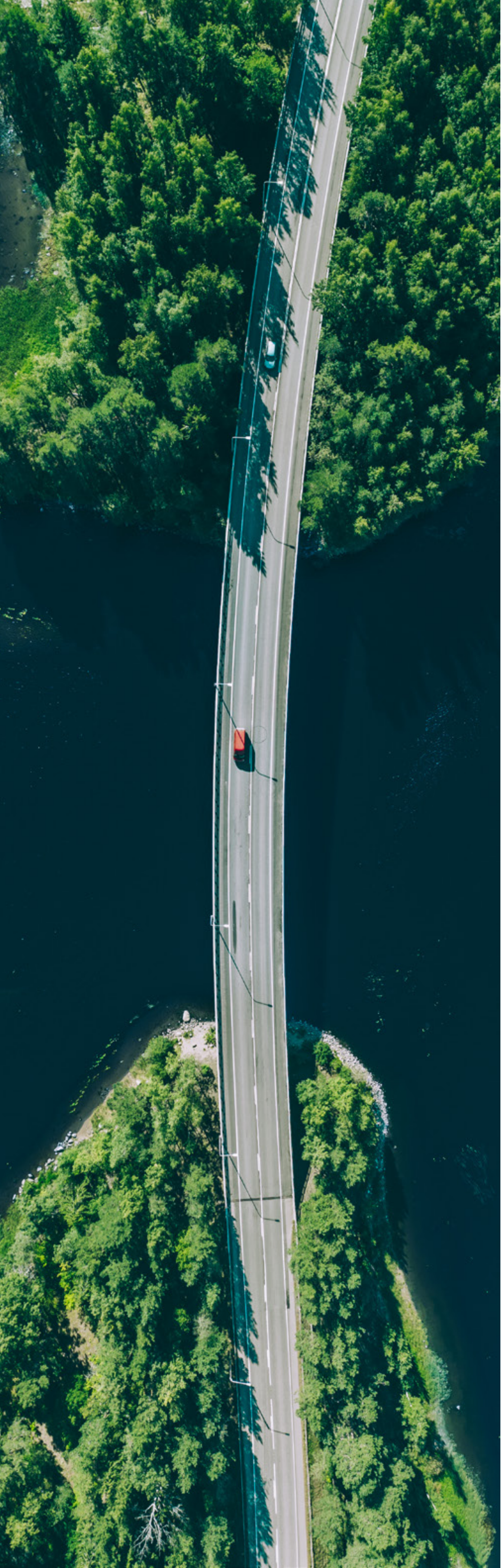


Manulife
Wealth

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

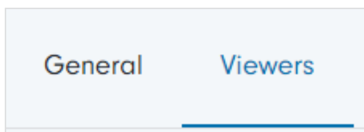
1

How to share accounts view access

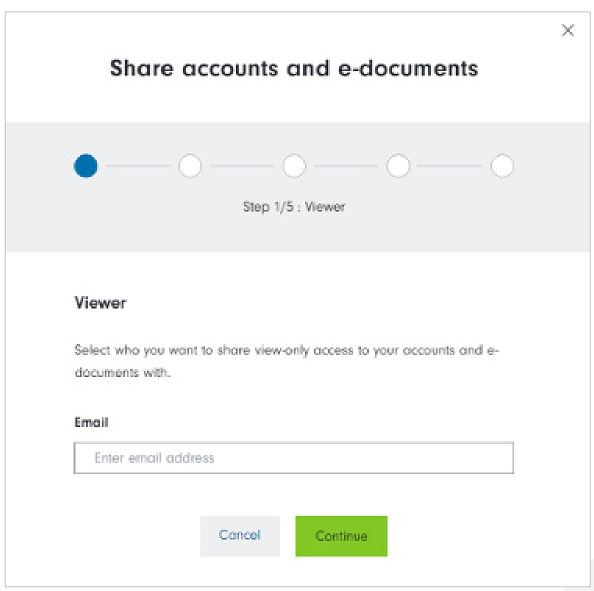
Sending the invitation

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

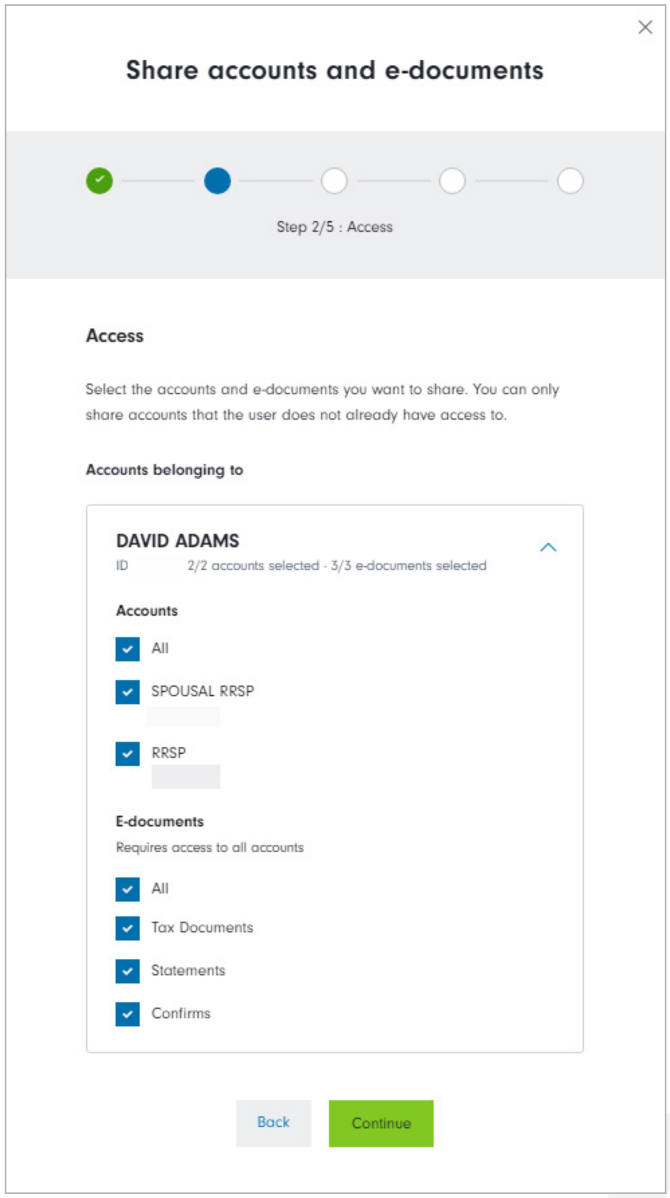
- Under **Profile**, click **Viewers**.



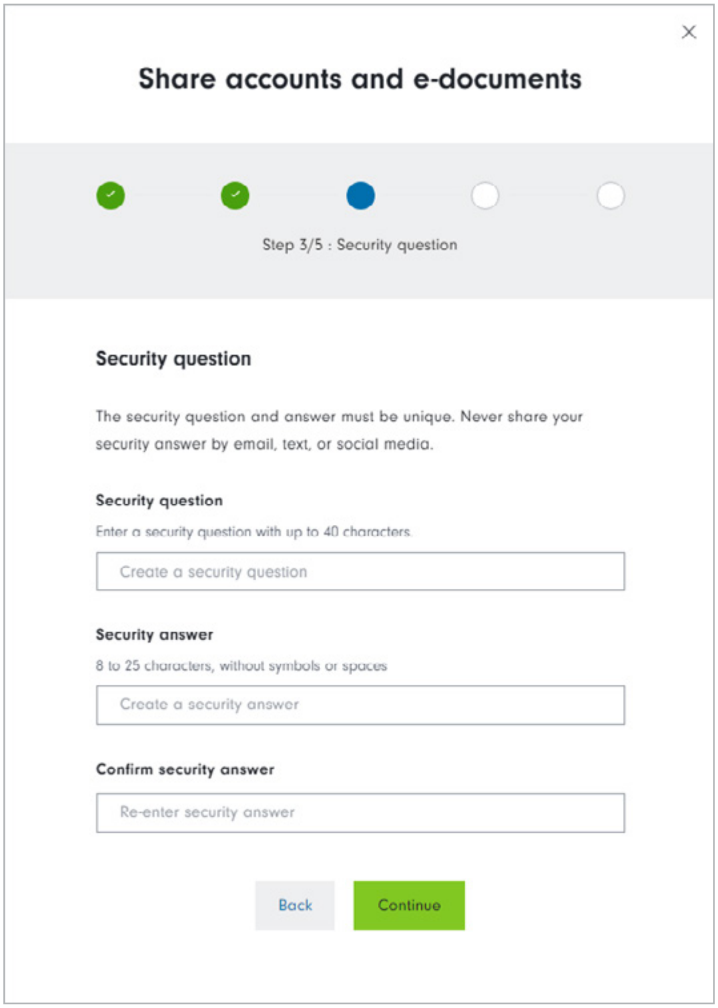
- Enter the email address of the person you wish to share the account information with and select if that person is a new or existing viewer. Click **Continue**. *Note:* The viewer must be registered for Investor Portal; otherwise **No user with this email address exists** appears. Each email can access only one account.



- 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**.

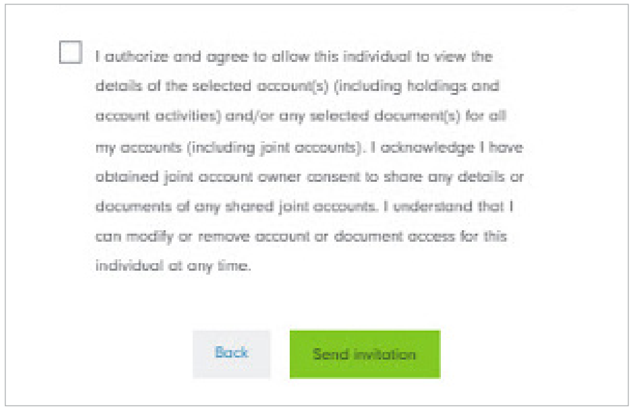


After selecting the accounts, choose a security question. The invitee will need to answer this question. Never share your security answer via email, text, or social media.

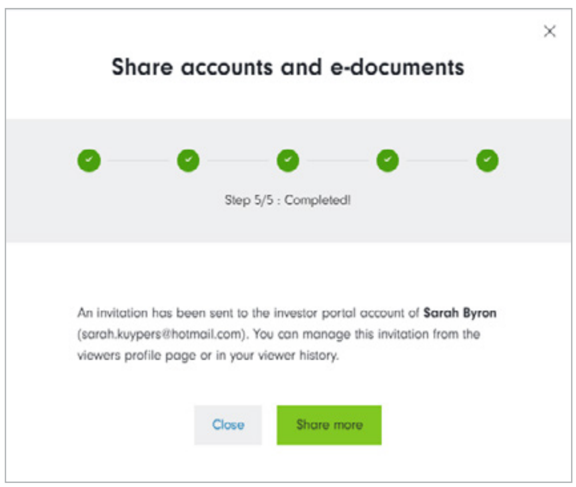


Review the information in the invitation template. If changes are needed, click **Back** to edit.

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



- You may close the window or create a new invitation to share information with another person.



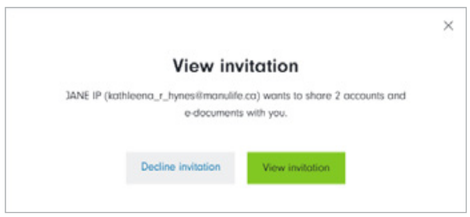
- In the **Viewer** menu, you can see who you've invited and the status of each invitation.

2

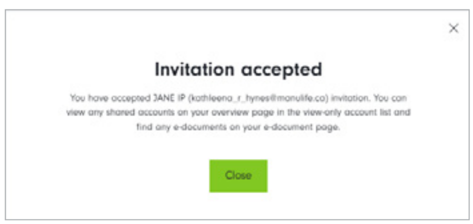
How to accept an invitation for accounts shared with you

- 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.

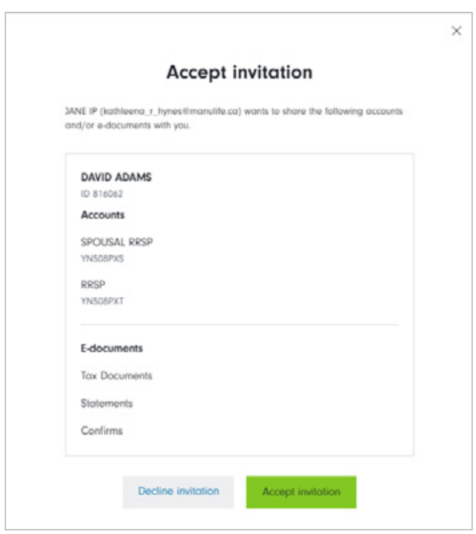
- Choose to view or decline the invitation.



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



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

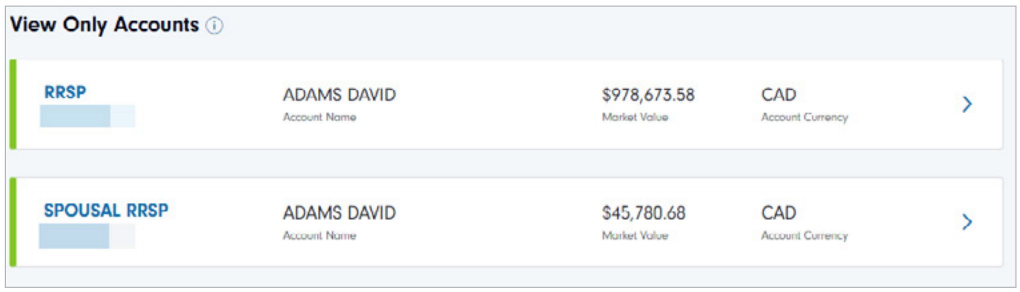


- Review the invitation details, including the shared accounts and/or e-documents. Choose to accept or decline the invitation.

3

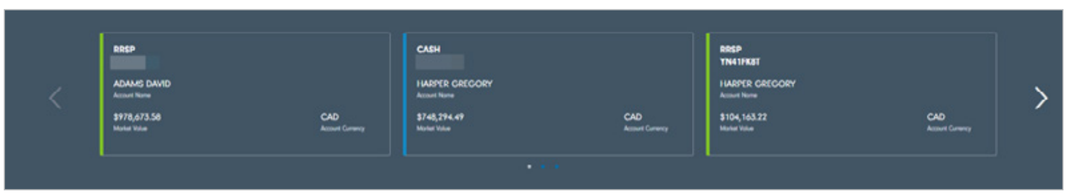
Viewing accounts/e-documents that have been shared with you

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

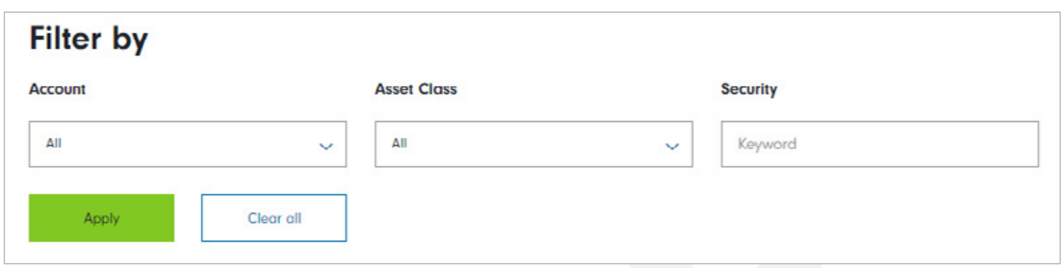


- Clicking **Accounts, Holdings, Activity**, or **E-documents** in the main menu will display information related to the shared account(s).

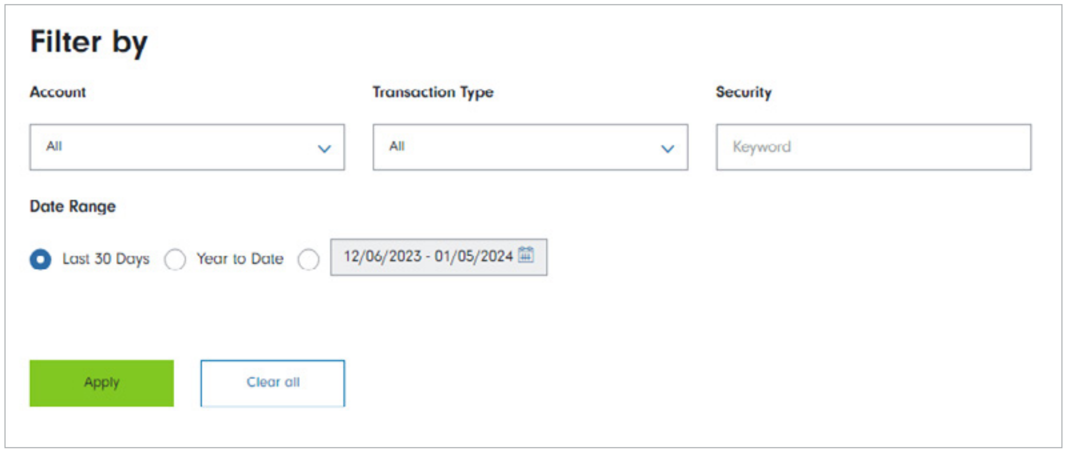
Accounts



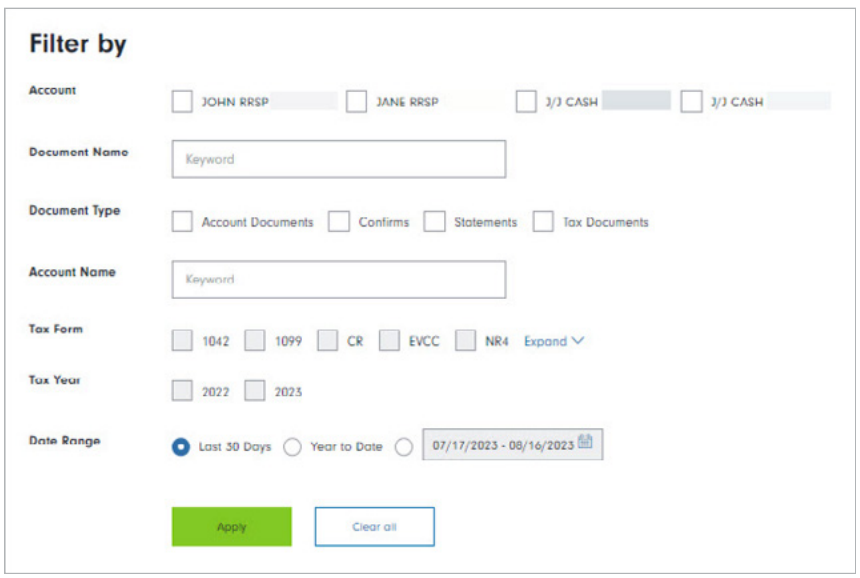
Holdings



Activity



E-documents



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