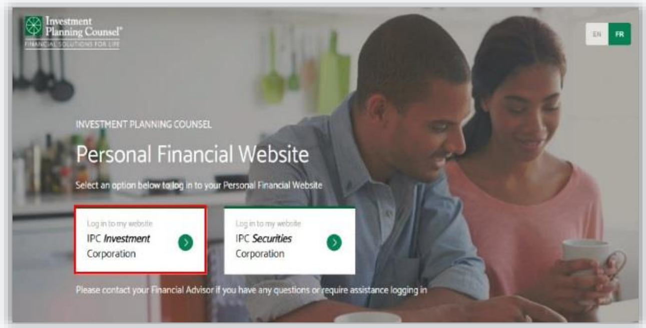
Personal Financial Website

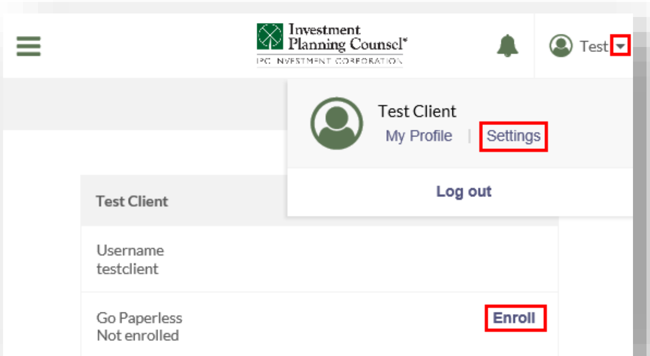
Client Registration Guide

Your **Personal Financial Website** is a digital tool that allows you to view your IPC quarterly statements, Fund Facts, and other important documents online. It provides you with convenient 24/7 access to your personal information and an option to receive your statements electronically.

HOW TO REGISTER:

1. Registration instructions will be sent by our team via email. The email will be from donotreply@ipcc.ca.
   Note: Please do not reply to this email. Should you need assistance, please contact your Advisor directly.
2. Click on the enclosed link and follow the steps to complete setup.
3. To register you will need to provide the following:
   a) Last 3 digits of SIN.
   b) Date of birth
   c) Last name
4. Create a username & password.
5. Answer 3 security questions.
   Note: Please remember your answers as they are required should you need a username or password reset.





ENROLL FOR eDELIVERY AND GO PAPERLESS!

Receive Statements, Trade Confirmations* and, Tax Receipts** electronically.

1. Click on the dropdown menu beside your name on the top right-hand corner then select **Settings**.
2. See **Go Paperless** and select **Enroll**.
3. A disclaimer will appear; select **Continue and Agree**.

∗ *Trade Confirmations apply to IPC Nominee accounts & Client Name accounts with Counsel Portfolio Services only.*
** *Tax Receipts apply to IPC Nominee accounts only.*

FAMILY LINKING – SHARING YOUR ACCOUNT

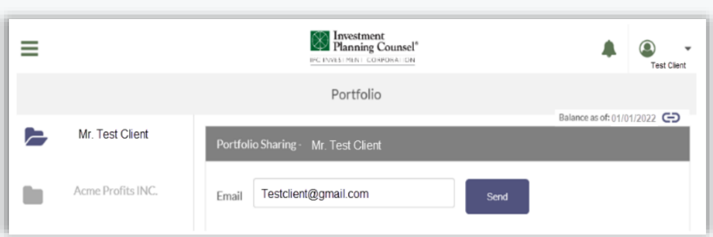
Share account information with family members who have the **same Advisor.**

WHAT YOU NEED:

The **email address** of the person with whom you wish to share your account information.

HOW TO SHARE:

4. From the home screen, select the (link) button.
5. Enter the email address of the family member you would like to share with.
6. Your investment portfolio details will appear on your family member's Personal Financial Website portfolio.



For more information, please contact your Advisor.

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