Investment Planning Counsel®
IPC SECURITIES CORPORATION

ADVICE YOUR WAY™

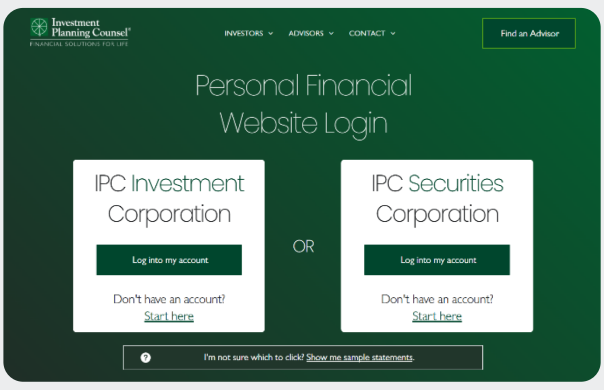
Personal Financial Website Client Registration Guide

The Personal Financial Website, also known as My Portfolio+, has been designed with a secure, user-friendly interface, providing you on-demand access to your account information, stock quotes and important documents!

First Time Signing In

Our team will provide you with your User ID and temporary password. Go to **Personal Financial Website** and follow the on-screen prompts to finish setting up your account.

Note: Your temporary password will expire after 10 days.



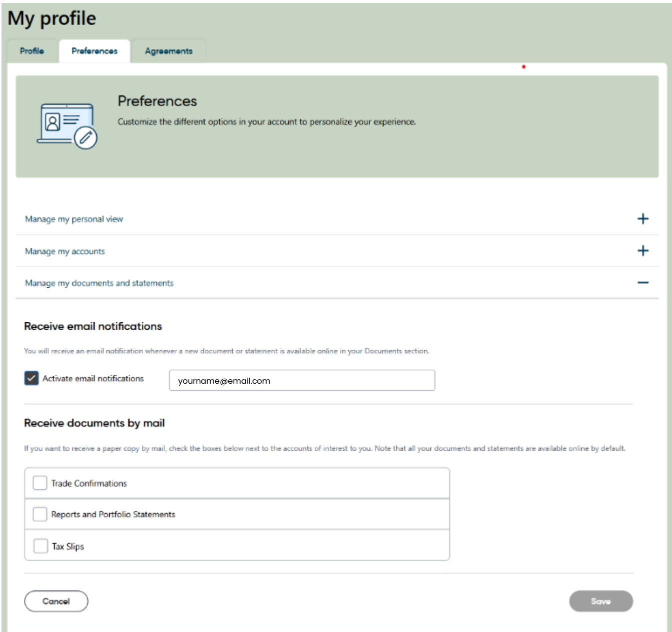
1. Enter your User ID and temporary password, then click 'Sign in.'
2. Define your new password.
3. Select three 'secret questions' and enter your answers. *(These will help in the event you need to recover/reset your password!)*
4. Read and accept the User Agreement.
5. Select your document delivery preferences – select 'online' to sign-up for e-delivery!

Now you can view your portfolio, on-demand via the Personal Financial Website!

Secure Digital Library

To sign-up for e-delivery and receive your documents electronically:

1. Open your profile settings.
2. Click the **Preferences** tab.
3. Select '**Manage my documents and statements**.'
4. In the section '**Receive documents by mail**,' ensure the checkbox for each listed document is unchecked to receive your documents electronically.



OnDemand Information

With your password protected and secure, gain instant access to your documents such as:

- Portfolio summary
- Account details
- Transaction history
- Market information

Link Household Accounts

To protect your personal privacy, you can only see accounts under your own name. If you would like to link accounts with other members of your household, or other owned non-personal accounts, please contact our team.

NOTE: All accounts under the same client registration will be automatically householded for online access.

Contact our team to link other client registrations for online access, i.e., a joint account or a commercial account.

For more details on how to navigate the Personal Financial Website click here.

For assistance with the Personal Financial Website, please contact our team.

For technical support, please call 1-855-844-0172 Monday to Friday 8AM - 8PM ET.

For tax receipts issued by the Fund Company, please contact our team, or the Fund Company directly.

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