Investment Planning Counsel®
FINANCIAL SOLUTIONS FOR LIFE

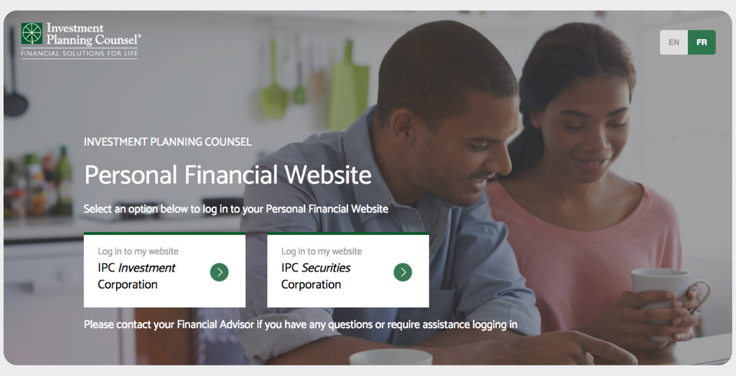
ADVICE YOUR WAY™

Personal Financial Website Client Registration Guide

The Personal Financial Website, also known as My Portfolio+, has been designed with a user-friendly interface, which gives you the ability to easily access account information and stock quotes.

First Time Logging In

Our Team will provide you with the initial login credentials. Go to Personal Financial Website to complete your self registration. **Your login password will expire after 10 days.** You need to reset this password with your chosen secure password. You will be prompted with instructions on how to do this.



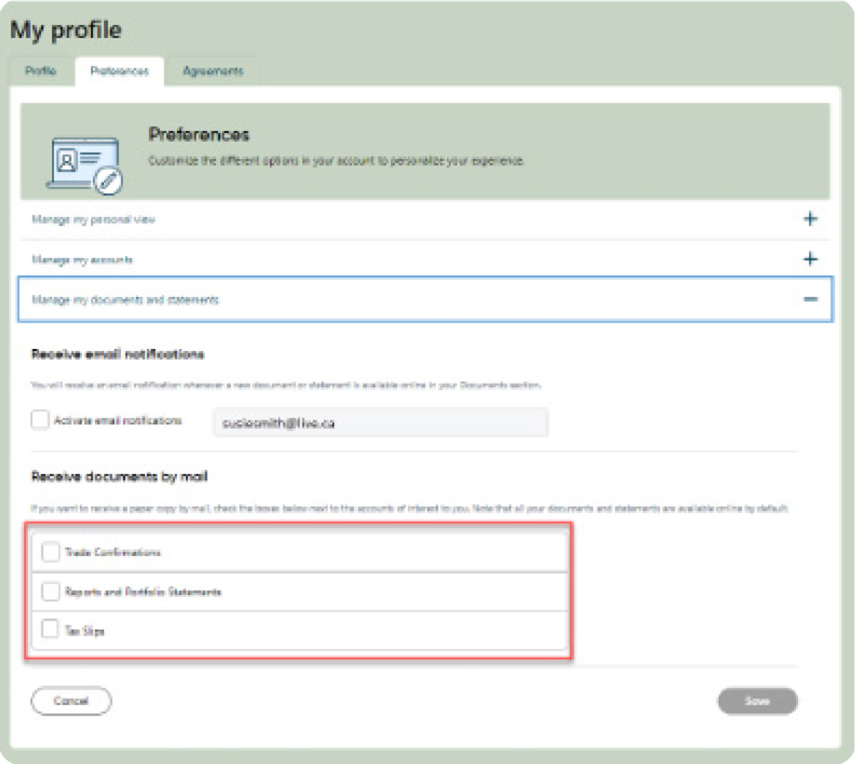
Once you've selected your new password, you'll need to select three security questions. These security questions can be used to recover your password.

Upon logging in, you will need to provide:

- 6-character Client ID (located on statement)
- Email
- First and last name
- SIN
- DOB

Secure Digital Library

Click on the **Preference** tab to go paperless to receive your documents digitally. As long as the boxes below are unchecked, you will 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 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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