

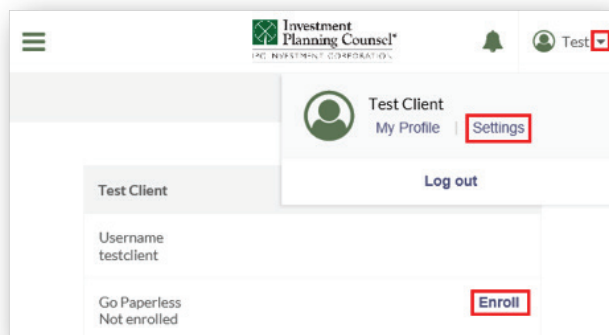
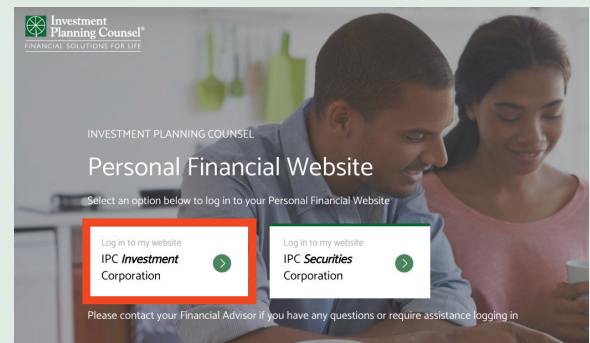
Personal Financial Website

CLIENT REGISTRATION GUIDE

Your **Personal Financial Website** is a unique web-based concept that allows you to track your investments, view your IPC quarterly statements and Fund Facts documents electronically, and more. This tool can truly help you and your family by keeping you updated on achieving your goals.

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 our team 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.



ENROLL FOR EDELIVERY TO RECEIVE PAPERLESS STATEMENTS!

To enroll in eDelivery:

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


FAMILY LINKING – SHARING YOUR ACCOUNT

Family linking allows you to 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:

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



For more information, please contact our Team.