Personal Financial Website

CLIENT REGISTRATION GUIDE



The Personal Financial Website, known as **My Portfolio+**, has been designed with a user friendly interface, which gives you the ability to easily access account information and perform market and product research.

HOW TO REGISTER:

- Register by calling NBIN Online Support at I-855-844-0172.
- **2.** During registration, you will be asked to provide:

Brokerage Account Number
(6-digit Client ID from your statement).

- SIN
- D.O.B.



ONLINE TOOLS! You can take a closer look at your assets using any of these online tools:

- **I. Virtual Portfolio:** Creates up to 10 portfolios to allow for tracking and monitoring of stocks.
- **2. Alerts:** Tracks prices for stocks of interest and receive alerts.
- **3.** Watch List: Analyzes bonds or personal interest.
- 4. RRSP Calculator: Assists in calculating amounts required to invest in RRSP's to reach retirement goals.

ACCESS STATEMENTS ONLINE!

Easily access your statements by clicking on the eServices tab to change your delivery preferences for:

- I. Account Statements
- 2. Trade Confirmations
- 3. Tax Slips

For tax receipts issued by the Fund Company, you may contact your Advisor or the Fund Company directly.

	Quotes & Markets	Tools	eServices	20
ELECTRO	NIC DOCUMEN	TS		
Trade confirma	ations Statem	ients Tax	slips Deli	very Preferences
To update the list of e	ligible accounts for the	e electronic docu	ments service, pleas	se contact your Investment Advisor.
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Step 1 of 2 : The following table st	nows the document de	elivery options. To	modify your deliver	ry preferences, select the preferred option.
Preference selection	All electronic	All paper		
Personal Accounts				
Trade confirmation		Electronic	Paper	
4JABCD - CLIENT, J	105		Paper	
4JEFGH - CLIENT, J		0		
Portfolio Statement		Electronic	Paper	
4JABCD - CLIENT.			(upor	
4JEFGH - CLIENT,				
Tax Slip		Electronic	Paper	
	105		() apor	
		0	0	
4JABCD - CLIENT,				
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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, please contact your Advisor.

For more information, please contact your Advisor.

