

InvestorOnline | HOW TO REGISTER



Information Required to Register

- Web Login ID*
- Assante Account Number*
- Last 4 digits of your SIN or Business Number for Corporate Clients
- Date of Birth
- Email Address

Locating your Web Login ID and Assante Account Number

*Your Web Login ID can be found on the mailed copy of your statement or by clicking on **Retrieve Web Login ID** on the Assante InvestorOnline registration page.

*Your Assante Account Number can be found on the mailed copy of your statement.

If you need assistance, please contact the Assante Service Centre for Assistance.

Security Questions Tips

- Use one or two word answers which are easy to remember.
- Security Question 5 allows for a customized question and answer.
- Use the Register your Computer to bypass your login security questions.

Now that you have gathered all of the information required, follow the three easy steps on the other side of the page to complete the registration process.

GESTION DE PATRIMOINE
Assante
WEALTH MANAGEMENT

CLIENT ACTIVITY REPORT FOR
John Smith
October 1, 201X to December 31, 201X

Web Login ID: 1234567

*0000130

YOUR FINANCIAL ADVISOR ...
ASSANTE CAPITAL MANAGEMENT LTD.
Jane Doe
545 Main Street
Anytown, ON M1N 1B1
Phone: (555) 888-8888
Fax: (555) 888-7777
e-mail: jd@assante.com

John Smith
123 Main Street
Unit 1
Anytown, ON M1N 1B1

Find out more on Assante InvestorOnline
To access your Assante managed accounts online, see your daily market value or to obtain account-related documents such as Assante issued transaction confirmations, tax receipts and statements, visit www.assante.com and click CLIENT LOGIN.

Summary of your Investments as of December 31, 201X

Registered Investments			
PLAN TYPE	ACCOUNT NUMBER	MARKET VALUE	PERCENTAGE OF YOUR INVESTMENTS
RESP	91615181CR	\$2,559.90	16.98%

Non-Registered Investments			
PLAN TYPE	ACCOUNT NUMBER	MARKET VALUE	PERCENTAGE OF YOUR INVESTMENTS
Open	92625261CO	\$12,515.25	83.02%

Total Investments **\$15,075.15** **100.00%**

All values reported reflect cash and investments that are posted in your portfolio and do not include pending transactions



How to access Assante InvestorOnline

1. Visit Assante.com
2. Click Login, and
3. Select Assante InvestorOnline.

To register, click on the Register Now.

Follow these 3 simple steps to register



Step 1: Provide your personal information.

You will be required to provide your personal information and accept the User Agreement.



Step 2: Make your account secure.

Setup your Assante InvestorOnline security settings:

- Create a Nickname (optional)
- Create a Password
- Choose your Security Questions and Answers.



Step 3: Choose how you wish to receive your documents.

Select the documents for which you would like to receive an e-mail notification once they are available online. Once complete, accept the Electronic Document Consent form.

If electronic documents are selected, hard copies will not be mailed to you. Assante will notify you by email when the documents are available online.

Proceed to Assante InvestorOnline

You will receive a confirmation notice.

To complete your registration, and access Assante InvestorOnline, you must click on the 'click here' link and answer one of your security questions.

Please note that access to My Portal will be granted within one business day after registering for Assante InvestorOnline.

How to add the Assante InvestorOnline shortcut to your smartphone



1. Launch the Assante InvestorOnline webpage.

2. Tap one of these icons (according to your device).



Apple



Android

3. Tap Add to Home Screen and enter a name for the shortcut.

Additional Support

The Assante Service Centre is available Monday to Friday 8 am to 6 pm ET. Telephone: 1-800-268-3200 | Email: service@assante.com