InvestorOnline | SHAREVIEW

Sharing your Assante portfolio using InvestorOnline is easy with ShareView

What is ShareView?

ShareView allows InvestorOnline users to share their account information with one another and gives account holders access to their relevant accounts in one place.

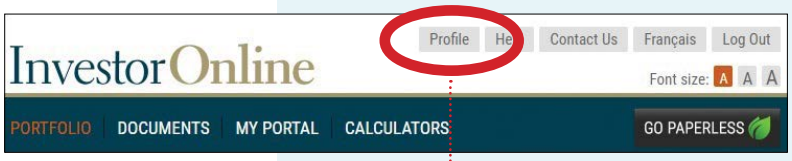
Manage your household's accounts easily and efficiently using Assante InvestorOnline.

Where is ShareView located?

Shareview is located in Assante InvestorOnline

Accessing ShareView

1) Once logged in to Assante InvestorOnline, click on the Profile button:

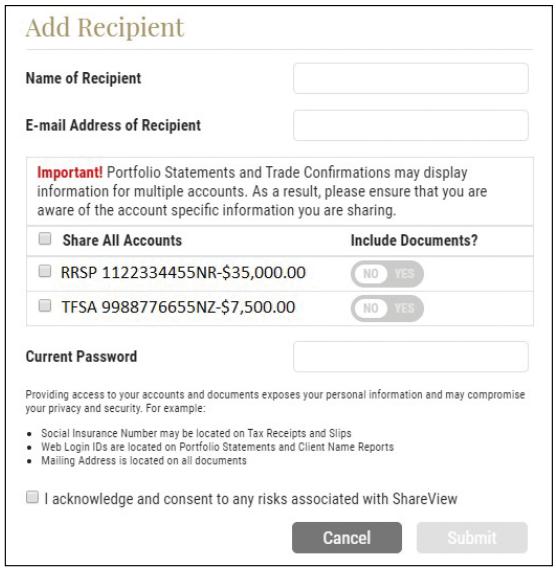


2) Select the ShareView tab:

3) First-time visitors are presented with an introduction message highlighting the benefits of ShareView and how it works.

Activating ShareView

4) Once on the ShareView screen, click "Add New Recipient" and complete all fields in the form:



Add Recipient

Name of Recipient

E-mail Address of Recipient

Important! Portfolio Statements and Trade Confirmations may display information for multiple accounts. As a result, please ensure that you are aware of the account specific information you are sharing.

Share All Accounts	Include Documents?
RRSP 1122334455NR-$35,000.00	NO YES
TFSA 9988776655NZ-$7,500.00	NO YES

Current Password

Providing access to your accounts and documents exposes your personal information and may compromise your privacy and security. For example:

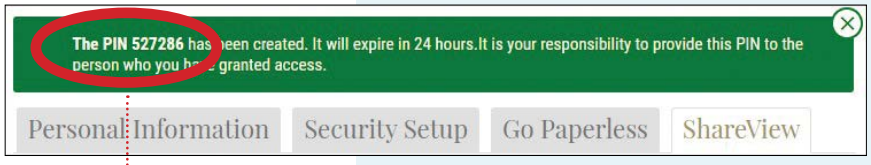
- Social Insurance Number may be located on Tax Receipts and Slips
- Web Login IDs are located on Portfolio Statements and Client Name Reports
- Mailing Address is located on all documents

I acknowledge and consent to any risks associated with ShareView

Cancel Submit

Assante® WEALTH MANAGEMENT

5) After submitting the form, you will receive a unique PIN in the green banner on the ShareView screen, which **you provide to the "Recipient"**.

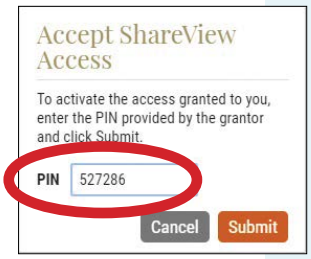


Accepting ShareView

6) The Recipient will receive an email from Assante containing an "Activate ShareView" button.

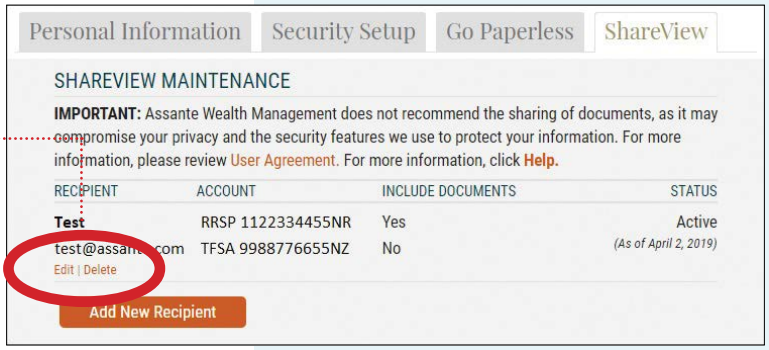
- The Recipient will click the button to open the InvestorOnline login screen and once logged in, a PIN box will pop up.
- The Recipient will be asked to enter the PIN to activate ShareView.
- Once entered, the Recipient will see the account(s) you granted in their own Portfolio Overview.

Important note: For security purposes, the PIN can only be used with the button in the email.



ShareView maintenance

7) At any time, you can return to the ShareView screen and select Edit to amend the access (add/remove accounts or documents) or select Delete to cancel the access.



Need assistance? Click the Help section within InvestorOnline for a closer look at ShareView.

For further assistance, our Financial Service Representatives are available between 8 a.m. and 6 p.m. ET, Monday to Friday.
Telephone: 1-800-268-3200 | Email: service@assante.com

Assante® WEALTH MANAGEMENT

1903-0878_E (04/19)