

# ASSANTE INVESTOR ONLINE SHAREVIEW

**Assante InvestorOnline** users can now grant access to another Assante InvestorOnline user.

You may benefit from **ShareView** if you have:

- multiple people in your household owning accounts at Assante, but only one person monitors the entire household portfolio
- personal and corporate accounts at Assante

## HOW DOES IT WORK?

1. Go to the **Profile** section (top right) in Assante Investor Online and then choose the ShareView button.



2. You input the recipient's details (name and email address) and choose the accounts you wish to share, with or without documents.  
**Important:** Portfolio Statements and Confirmations containing multiple accounts will not be amended based on the ShareView setting.
3. Assante generates the PIN, which expires in 24 hours and displays it in a green banner at the top of your ShareView screen. You must provide the PIN to the recipient.
4. Assante will email a special link to the recipient, which opens the Assante InvestorOnline Login screen. Upon successfully logging in, they will see an ENTER PIN pop-up. Only the PIN you provide can be used in this screen.
5. If the PIN is accepted, the recipient immediately has the access you've granted them. They just need to log out, and log back in first.

## SHAREVIEW HELP

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### What is ShareView?

ShareView is a feature that permits you to share your account information with other Assante InvestorOnline users, giving them the ability to monitor your market value, transactions, contributions, as well as the option for documents.

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### How does ShareView work?

1. You input the recipient's details and choose the accounts you wish to share, with or without documents.  
**Important** : Portfolio Statements and Confirmations containing multiple accounts will not be amended based on the ShareView setting.

**Example** : You own two Nominee accounts and share access to one of them with documents.

The recipient will have access to:

- the shared account via their Portfolio Overview screen
  - the shared account's Tax Receipts/Slips
  - both accounts on Portfolio Statements and Trade Confirmations
2. We generate the PIN, which expires in 24 hours and display it in a green banner at the top of your ShareView screen. You must provide the PIN to the recipient.
  3. We email a special link to the recipient, which opens the Assante InvestorOnline Login screen. Upon successfully logging in, we present them with a PIN pop-up. Only the PIN you provide can be used in this screen.
  4. If the PIN is accepted, the recipient immediately has the access you've granted them.
  5. The ShareView screen also stores the information as you have granted and allows you to edit and/or delete at your convenience.
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### What are the benefits of using ShareView?

1. Login with one ID & password to view multiple Assante portfolios.
  2. Easy access to statements, trade confirmations and tax documents for individuals residing in the same household.
  3. View your personal and corporate accounts in one view.
  4. Provides a total sum of a household portfolio with more than one individual.
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### I no longer wish to share my InvestorOnline account.

When on the ShareView tab and click the Delete button next to the individual whom you no longer wish to share your account with.

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### **Originally I did not share my documents, but now I want to. Do I have to initiate another PIN?**

No. When on the ShareView tab, click "Edit" and ensure your documents are set to "Yes".

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### **The PIN expired. What are my options?**

When on the ShareView tab, click "Resend" to initiate another PIN. Repeat this process until the PIN has been accepted.

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### **I shared my account successfully but I cannot see all of our accounts in my portfolio screen. When will I see them?**

You won't. When you share your account with another user, you are allowing them to view your account information. If you wish to view their accounts in your portfolio screen, they will have to grant you access via their ShareView.

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### **Can I share my accounts with more than one Assante InvestorOnline user at a time?**

Yes.

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### **The PIN was generated but the individual who I shared with did not receive an email.**

Check the email address that you entered when filling out the ShareView form. If it's correct, try again by clicking "Resend" to generate another PIN and email. If the user still is not receiving an email, please contact the Assante Service Centre and one of our representatives will assist you.

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### **I want to share my documents, but not my account value. Is this possible?**

No. Sharing accounts is mandatory; documents are optional.

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### **What does the edit button do on the ShareView page?**

It enables you to add or remove accounts and change the document settings.