

## Investor Portal guide

# Registering for Manulife Wealth Investor Portal

Investor Portal provides access to your Manulife Wealth account information and documents such as your statements online.

To register for Investor Portal, email [manulifewealthsupport@manulife.ca](mailto:manulifewealthsupport@manulife.ca) or you can reach out to your advisor.

You'll receive a registration invitation through email. It'll include a link to begin the registration process.

- **Please note:** This link expires after 48 hours. If the link expires, you'll need to request a new registration link.
- Investor Portal is supported in the following browsers: Google Chrome, Microsoft Edge, Apple Safari, and Firefox.

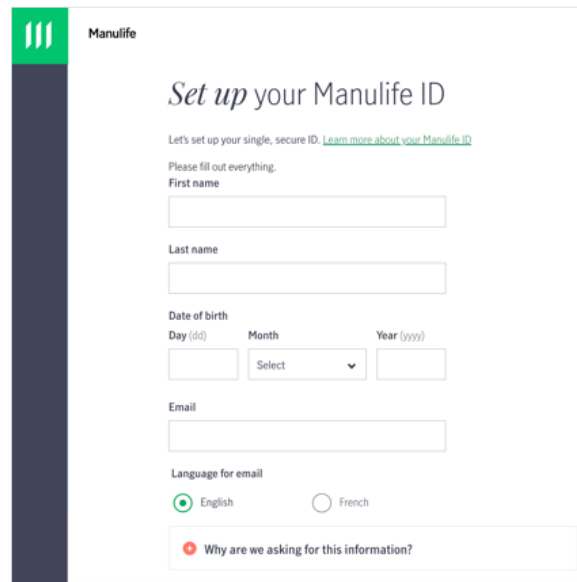


## Step 1: setting up a Manulife ID

**Note:** If you already have a Manulife ID, please proceed to Step 2: complete the Investor Portal registration.

Manulife ID is our secure login to access Manulife's different client online portals. If you don't already have a Manulife ID, you'll need to set one up before you complete the registration process for Manulife Wealth Investor Portal.

In the email, under **Step 1** click the link titled **Create a new Manulife ID**. When you click that link, the box illustrated below will appear which is the **Set up your Manulife ID** page.



The screenshot shows the "Set up your Manulife ID" registration page. It features the Manulife logo and a heading "Set up your Manulife ID". Below the heading, there is a link to "Learn more about your Manulife ID" and a prompt to "Please fill out everything." The form includes input fields for "First name" and "Last name", a "Date of birth" section with "Day (dd)", "Month" (a dropdown menu), and "Year (yyyy)" fields, and an "Email" field. At the bottom, there are radio buttons for "Language for email" with "English" selected and "French" as an option. A red question mark icon is followed by the text "Why are we asking for this information?"

Fill out the required information on the setup page and click **Continue**. Once you click **Continue**, you'll receive another email to activate your Manulife ID and you'll be asked to go to your email to click on the link in that message to activate your Manulife ID.

**Note:** The Manulife ID link that has been emailed will stay active for 15 minutes.

Once you've selected the email link to activate the Manulife ID, select **Sign in**.

Once you've signed in, you'll be asked to add your mobile (cell phone) number and select **Continue**. You will then receive a one-time code to your mobile number. Enter the code and select **Continue**.

*Hi Alesia!* Let's add a mobile number to your Manulife ID

**Why add a mobile number?**  
We use this mobile number to keep your Manulife ID secure. So we'd only use it for things like texting you a one-time code. With your permission, we may use it for other purposes.

Mobile number  
+1

You need to fill in your mobile number

**Continue**

**Don't have a mobile number**

Let's confirm your mobile number

We just sent a one-time code to **289-439-6782**. You've got **15 minutes** to use it.

Code

[Get a new code if needed](#)

**Continue**

**Didn't get the code?**

Check your mobile number—and make sure you've picked the right country code!  
If 289-439-6782 isn't right, you can go back and add a different mobile number. Or you can skip this step for now and do it later.

**Go back**

**Don't have a mobile number**

Your Manulife ID is now set up.

You'll now need to return to the Manulife Wealth Investor Portal registration email and continue to Step 2.

## Step 2: complete the Investor Portal registration

To complete this step, you must have a Manulife ID. If you don't have a Manulife ID, please see Step 1.

In the email under Step 2 select **Sign up for the Manulife Wealth Investor Portal**.

1 When you click this link, you'll be taken to the **Register Now** screen and your mobile number will be sent a verification code. Enter the verification code and click **Next**.

**Note:** This code is valid for 15 minutes. If you're unable to access this code or if you receive an error when entering the code, please contact your advisor or call Manulife Wealth support at 833-363-0699. Support be able to generate a new code and provide it to you.

**Register Now**

Step 1/6: Account Verification

**Account Verification**

Enter the one-time verification code sent to your phone number ending 439-6782.

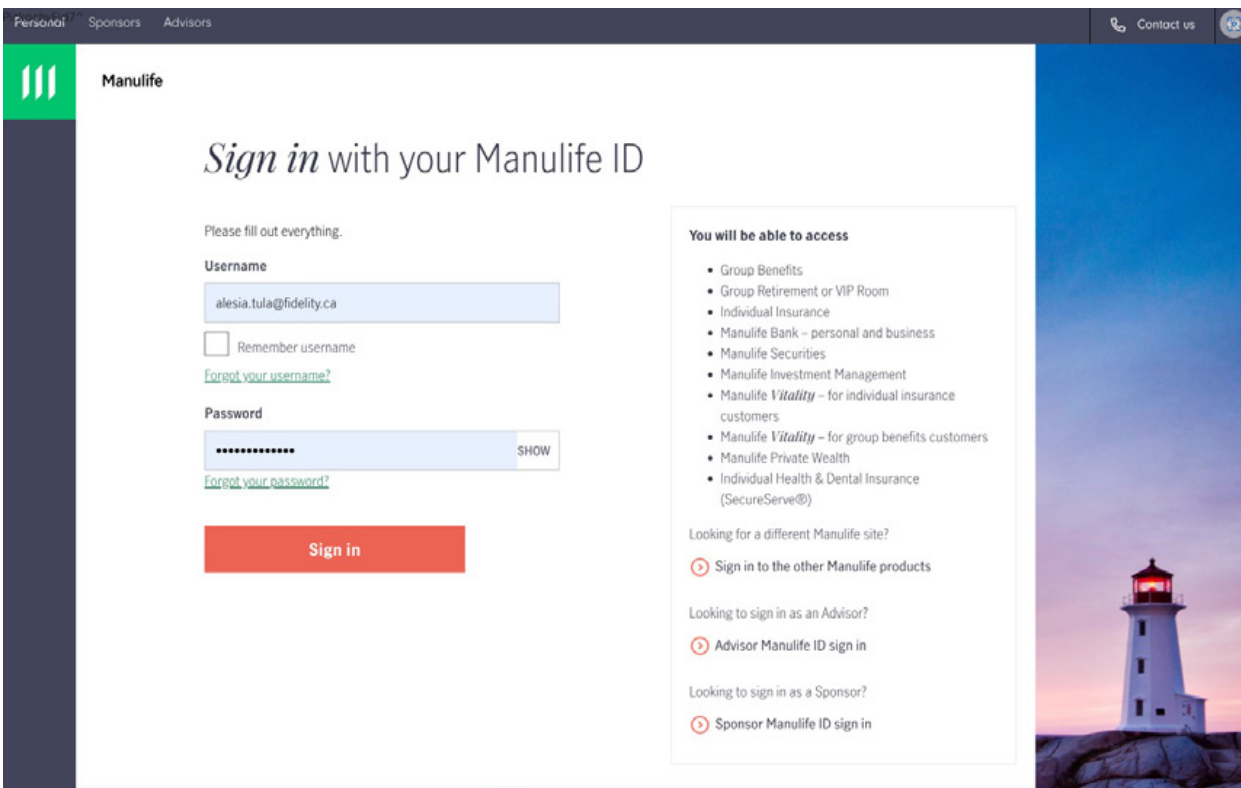
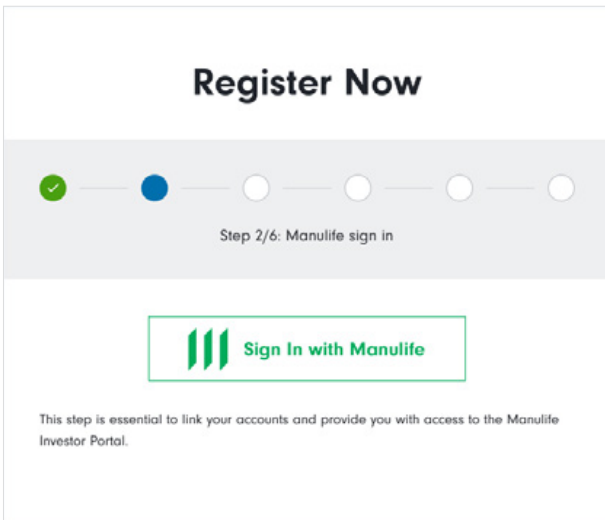
**Verification Code**  
00000

**Next**

This verification code is valid for the next 15 minutes. If you have not received a code, please request a new one after 1 minute. Please call support if this is not your phone number or you are not receiving any codes.

**Reset Code**

2 Click **Sign in with Manulife** and you will be taken to the Manulife ID login page. Sign in with your Manulife ID.



3 Once you've signed in with your Manulife ID, the screen will return to the next step in the registration. Enter your date of birth and the last four digits of your Social Insurance Number (SIN).

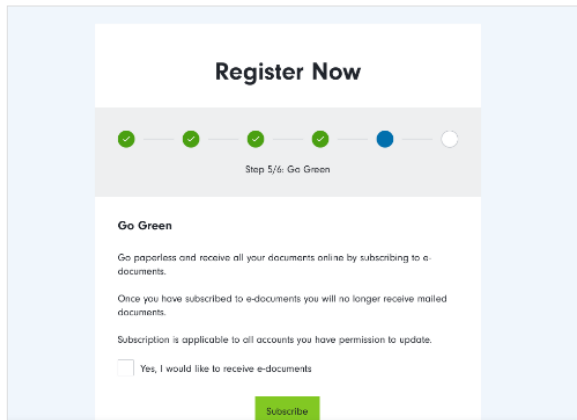
If you don't have a SIN, you can select **I do not have a Social Insurance Number**. If you select this, your access will be restricted until your advisor can verify your account.

The screenshot shows the 'Register Now' page at Step 3/6: Client Verification. The progress bar at the top has six steps, with the first two completed (green checkmarks) and the current step (blue circle) active. Below the progress bar, the text reads: 'Client Verification', 'Verify your date of birth and last four digits of your Social Insurance Number.', 'This information is required to validate ownership of your accounts, access documents and enable self-serve options.', and 'Please contact your advisor if you do not have your information or cannot enter it below.' There is a 'Date of Birth' field with the format 'MM/DD/YYYY' and a text input field with the placeholder 'mm - dd - yyyy'.

4 Review the **Terms of Use, Disclaimer Notice, and Privacy Policy**. Once you have completed your review, select the box at the bottom to indicate that you understand and accept the Terms and Conditions and have read the Privacy Policy to move to the next step.

The screenshot shows the 'Register Now' page at Step 4/6: Terms of Use, Disclaimer Notice, Privacy Policy. The progress bar at the top has six steps, with the first three completed (green checkmarks) and the current step (blue circle) active. Below the progress bar, there are three tabs: 'Terms of Use', 'Disclaimer Notice', and 'Privacy Policy'. The 'Terms of Use' tab is selected. The text reads: 'Investor Portal Terms of Use', 'This site is operated by Fidelity Clearing Canada ULC ("FCC", "we" or "us") from Canada on behalf of its investment dealers or portfolio manager clients ("Advisor(s)"). By using or accessing this site ("Portal"), you accept and agree to be bound by, and comply with these terms of use ("Terms"). If you do not accept these Terms do not use or access this Portal.', and 'FCC reserves the right, in its sole discretion, to change or update these Terms at any time, upon notice by posting the new Terms to the'.

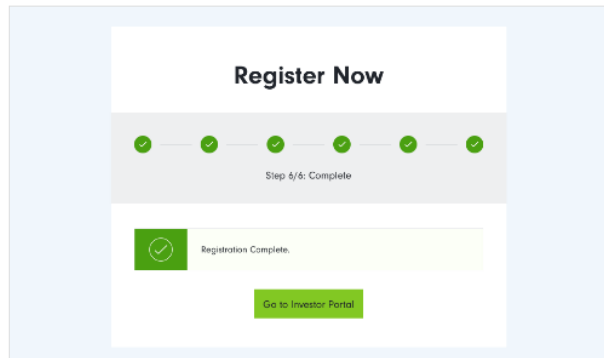
5 You'll have the opportunity to **Go Green** and subscribe to e-documents. By selecting this, you'll receive all your Manulife Wealth documents such as statements, trade confirmations, and tax receipts electronically. These documents will all be accessible on Manulife Wealth Investor Portal. To subscribe to this paperless delivery, select **Yes, I would like to receive e-documents** and click **Subscribe**.



The screenshot shows a registration progress bar with six steps. The first five steps are marked with green checkmarks, and the sixth step is marked with a blue circle. Below the progress bar, the text reads "Step 5/6: Go Green". The main content area is titled "Go Green" and contains the following text: "Go paperless and receive all your documents online by subscribing to e-documents.", "Once you have subscribed to e-documents you will no longer receive mailed documents.", and "Subscription is applicable to all accounts you have permission to update." There is a checkbox labeled "Yes, I would like to receive e-documents" which is currently unchecked. A green "Subscribe" button is located at the bottom right of the form.

You've now completed your registration and have access to **Manulife Wealth Investor Portal**.

Refer to the **Navigation outline** and **Account sharing** guides to learn more about the features available.



The screenshot shows the registration progress bar with all six steps marked with green checkmarks. Below the progress bar, the text reads "Step 6/6: Complete". The main content area is titled "Register Now" and contains a green checkmark icon followed by the text "Registration Complete." A green "Go to Investor Portal" button is located at the bottom right of the form.