

# 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 **Forgot your 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.

**Assante**  
GESTION DE PATRIMOINE  
WEALTH MANAGEMENT

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

Web Login ID: 1234567

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: jdoe@assante.com

**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](http://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 |
| IRSP                   | 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 *Client Login*, and
  3. Click *Login Now* for the portal right for you.
- To register, click on *Register now*, under *Already Registered*.

## 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 an e-mail confirmation notice.

### Additional Support

The Assante Service Centre is available Monday to Friday 8 a.m. to 6 p.m. EST. Telephone: 1-800-268-3200 | Email: [service@assante.com](mailto:service@assante.com)

