Assante Client Portal
Access Guide

CI ASSANTE WEALTH MANAGEMENT | Schmidt & Associates

Overview:

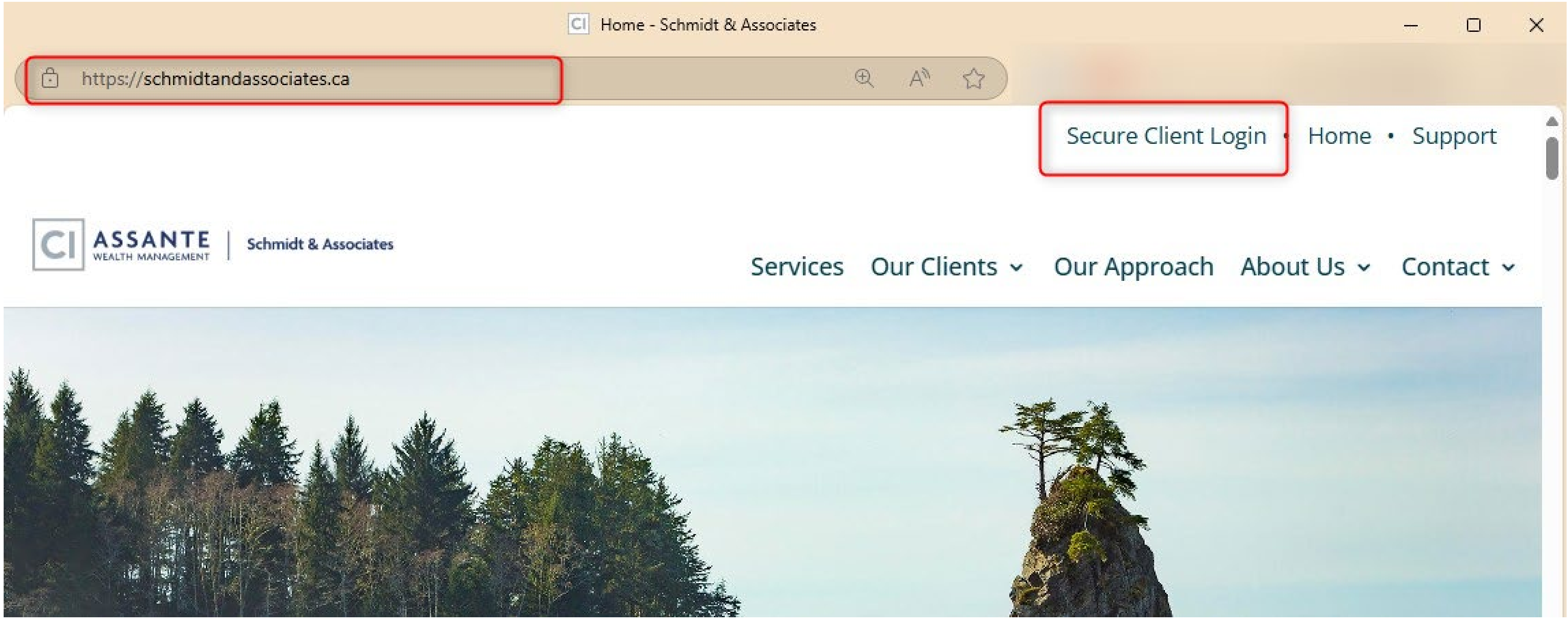
1. Assante Investor Portal offers real-time access to your investment account information, including statements and tax slips

2. Your accounts have already been registered, and you are now ready to log in to the Assante Investor Portal using the instructions provided on the following pages

3. Before logging in for the first time, we recommend watching this brief tutorial video: https://bit.ly/3Rwejjj

Assante Client Portal Login:

- Access **the 'NEW' Assante Client Portal** via the "**Secure Client Login**" dropdown at the top right of **schmidtandassociates.ca**



Registration Invitation:

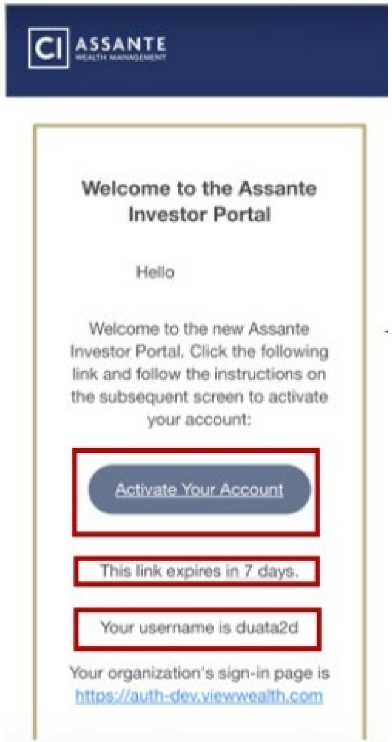
You should receive an email from noreply@assante.com with a link to activate your registration.

You will initially sign on to the Assante Portal interface.

This email will include:

- a link which will be active for 7 days
- your username

Click "Activate Your Account" to get started.



Validate Your ID:

You will need to provide specific information to validate your ID.
If you have 3 failed attempts to login you will receive the following message. "You have reached the maximum number of attempts.
Please contact us at schmidtandassociates@assante.com for assistance

Web Login ID: 1234567
Account Number: 12345678NF
First 4 digits of your SIN #

Assante Portal Registration

In order to register your account, please enter your client number, account number and first four digits of your BIN/SIN number for verification.

Client Number/Web Login ID ?

Account Number ?

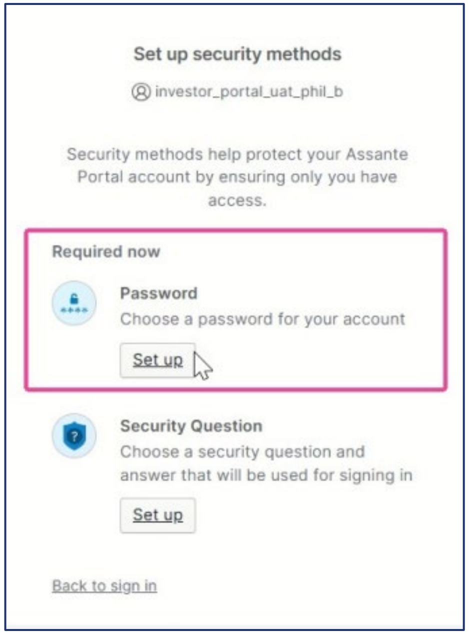
First 4 Digits of BIN/SIN ? 1234*****

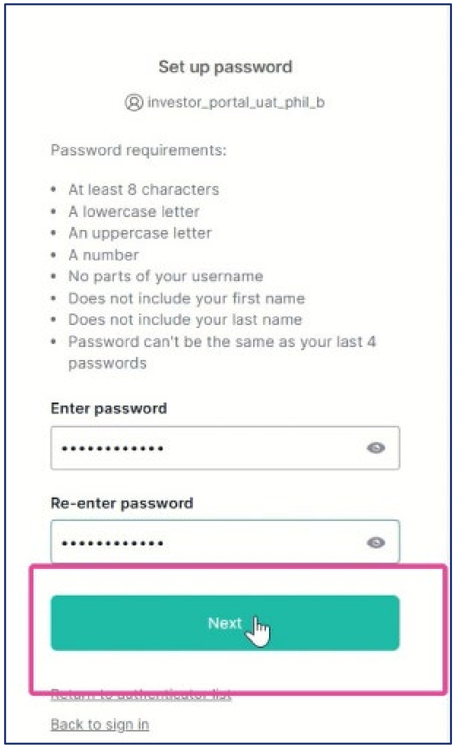
Submit

Password:

You must set up a password to move forward.

1. Create a Password.





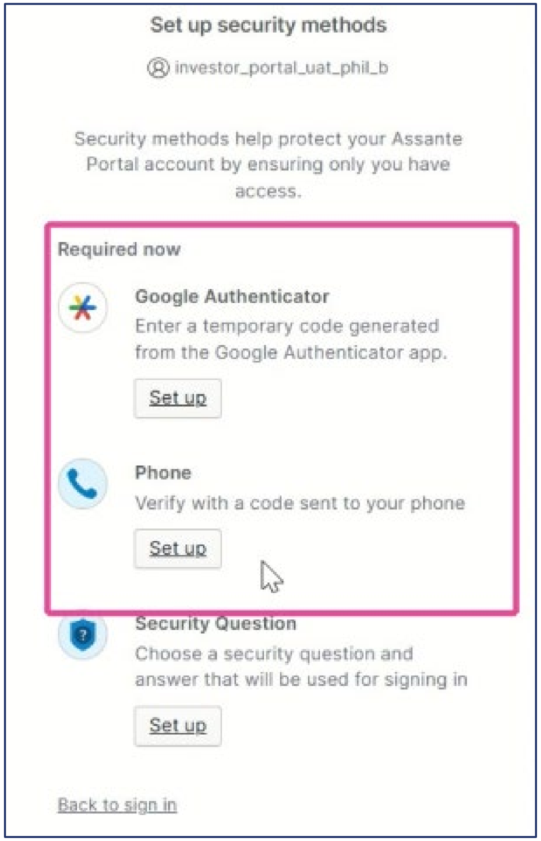
Security Set-up:

Now you will be required to set up your authentication method.

Complete one of the following security methods:

- Google Authenticator** or
- Phone: Text message to your phone

**You will have the option to set up Google Authenticator. This is not mandatory.

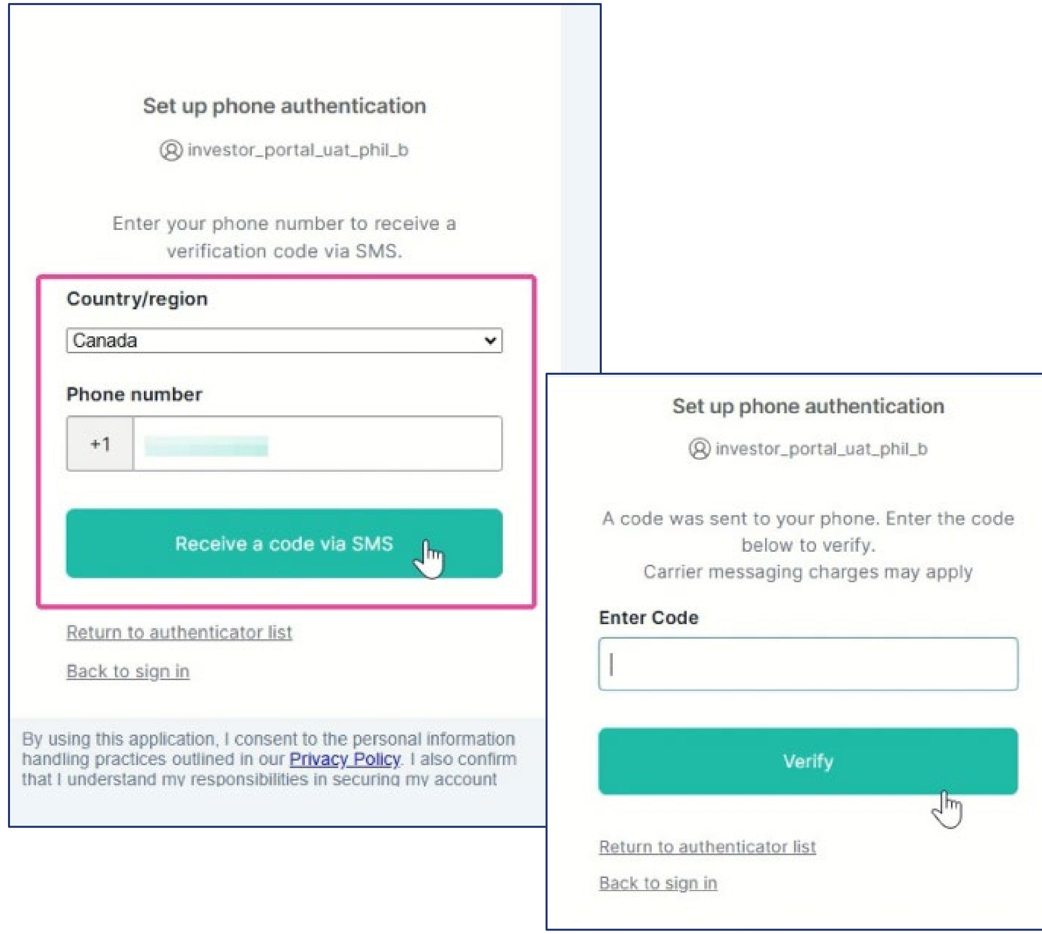


Phone Set-up (text):

If you choose phone setup you will be asked to enter your mobile number as indicated.

Click "Receive a code via SMS" to receive your validation code.

Enter the code and click "Verify"



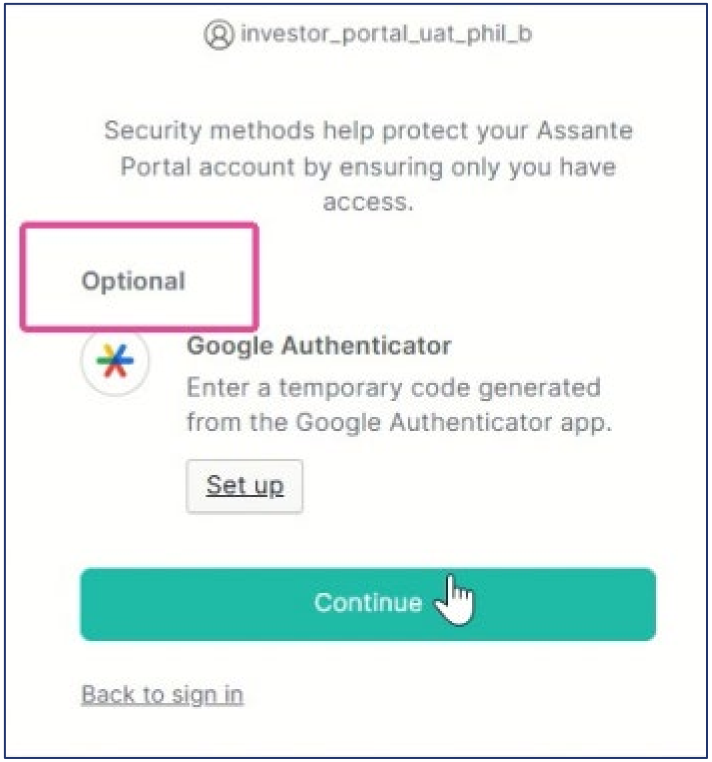
Google Authenticator:

You can also opt to verify using Google Authenticator to verify your identity once more.

This is strictly optional.

Click "Continue".

If you choose Google Authenticator, you will be asked to scan an QR code to receive a text code.



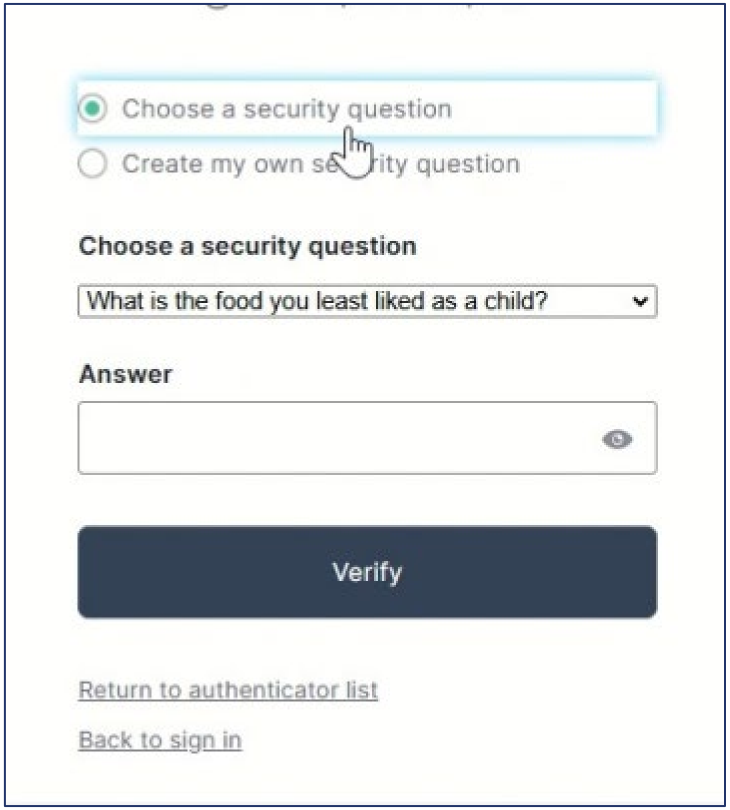
Security Question:

Next, you must create a security question.

This question is needed as a security feature should you lock yourself out of your account.

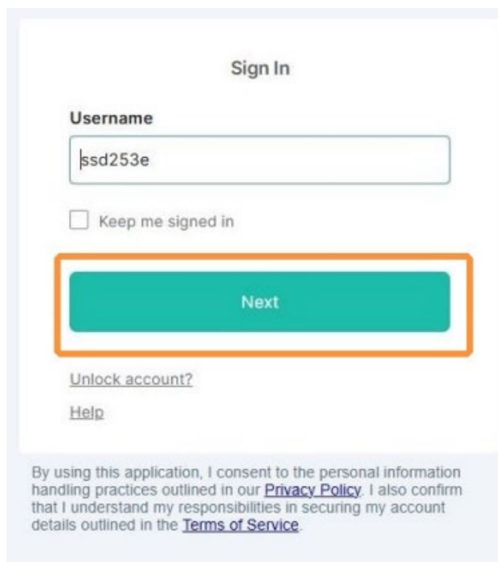
Choose a question from the dropdown menu or create your own.

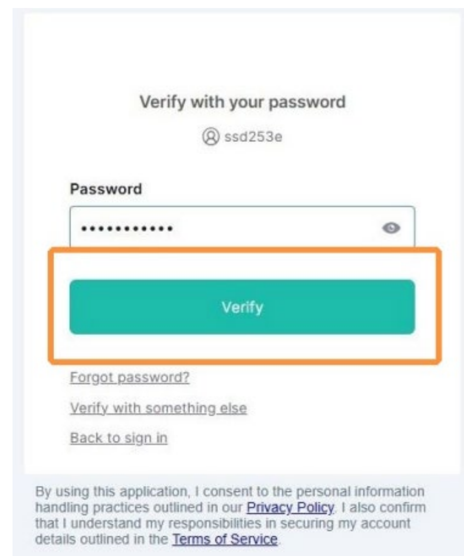
Enter your response and click "Verify".



Assante Portal Interface

- Enter your username that was on your registration email.
- Click "Next
- Enter the password you created earlier.
- Click "Verify".

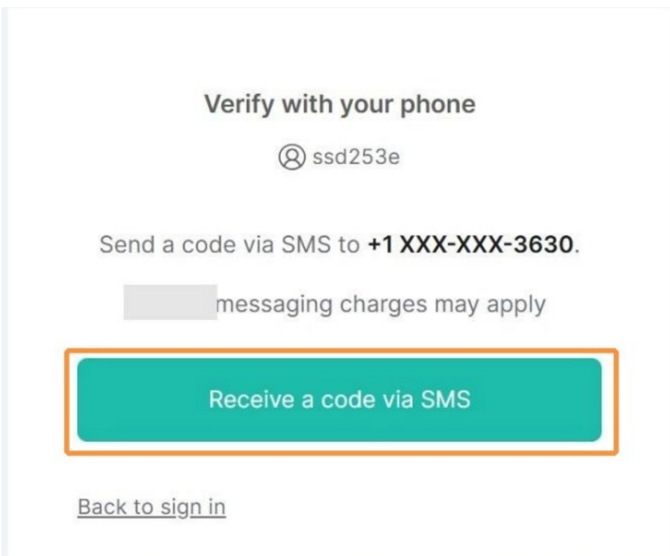


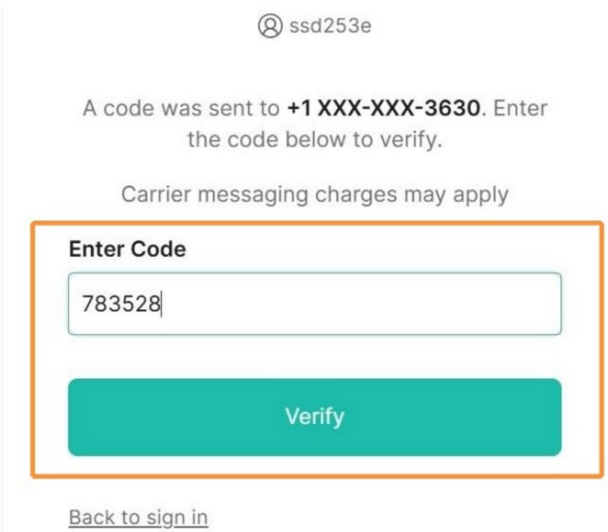


Muti-Factor Authentication

If you chose Phone MFA Authentication you will receive the message below.

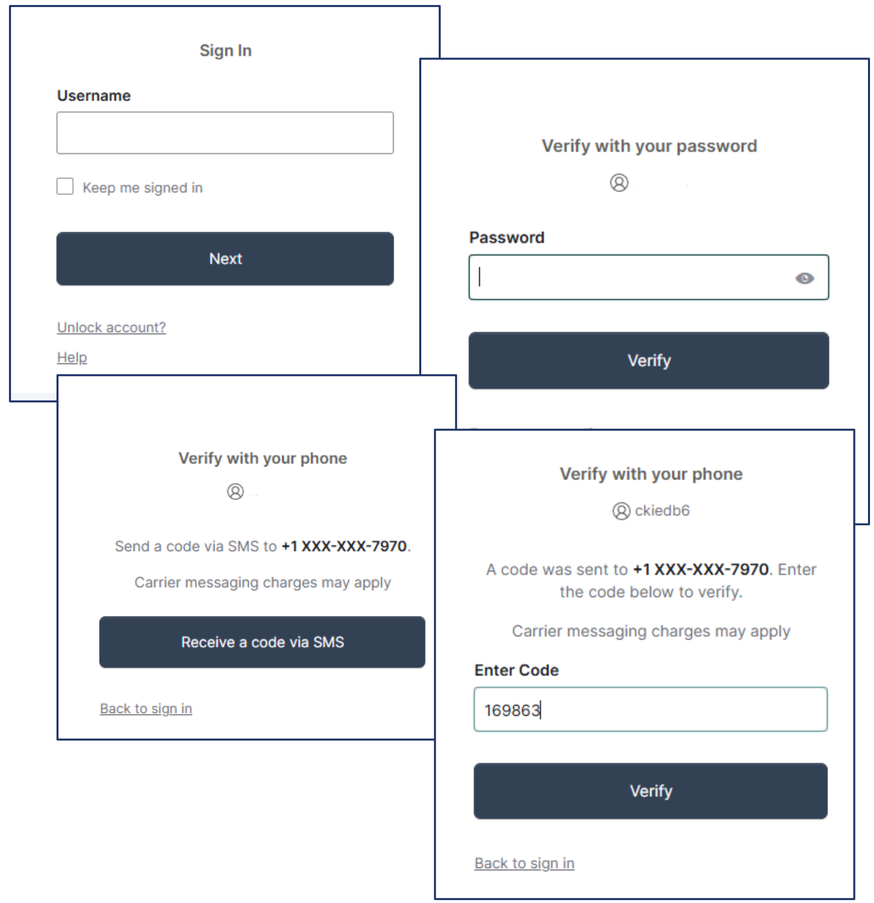
- Click on the teal button to receive a code via SMS.
- A verification code will be sent to the mobile phone number entered in the initial set up stage.





Log In:

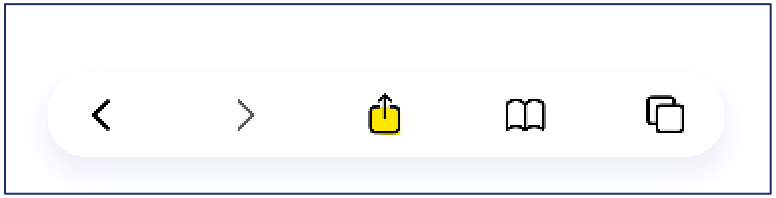
https://assante.viewwealth.com

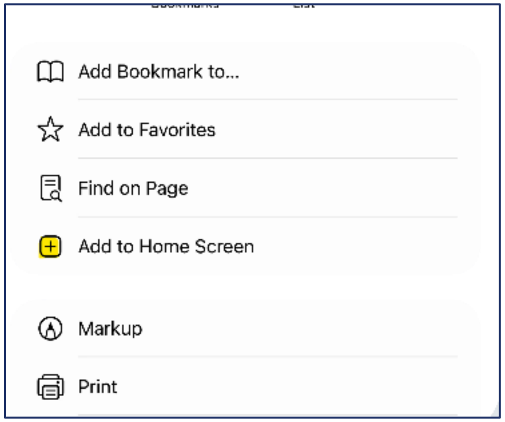


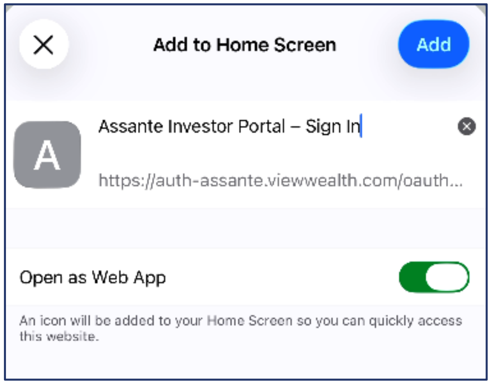
Save As an Icon on Phone:

Add a website icon to your iPhone Home Screen

- Open your browser
- Go to the website: https://auth-assante.viewwealth.com/
- Tap the Share icon(with arrow pointing up)
- Select "Add to Home Screen"
- Scroll down in the menu and tap Add to Home Screen.
- Name the icon
- You can edit the name so it's easy to recognize.
- Tap "Add"
- The icon will appear on your Home Screen like an app







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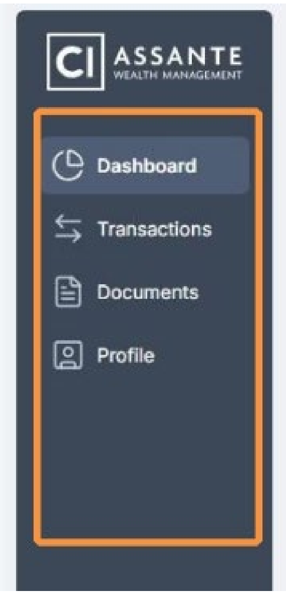
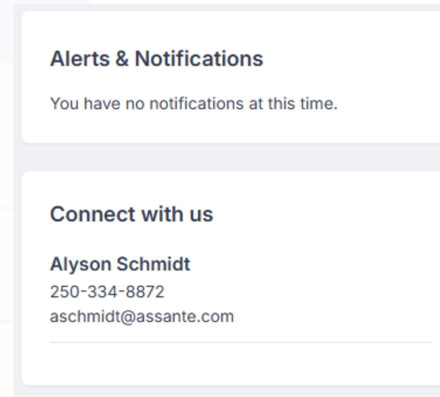
Landing Page:

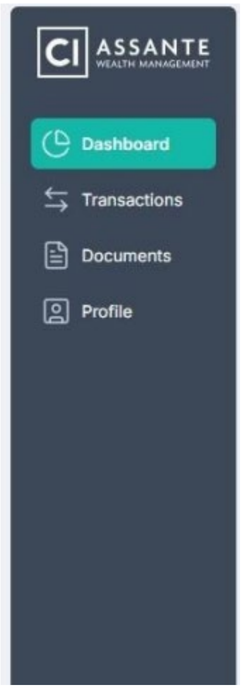


This is your landing page view.

- On the left of this page is your menu where you can access Transactions, Documents, and see your Profile.
- The graph in the middle is your performance graph from inception.
- On the right are Alerts and Notifications pertaining to your accounts.
  - It includes contribution schedules and **system** maintenance notifications.
- Return to this page by clicking "Dashboard" on the top left of the menu.



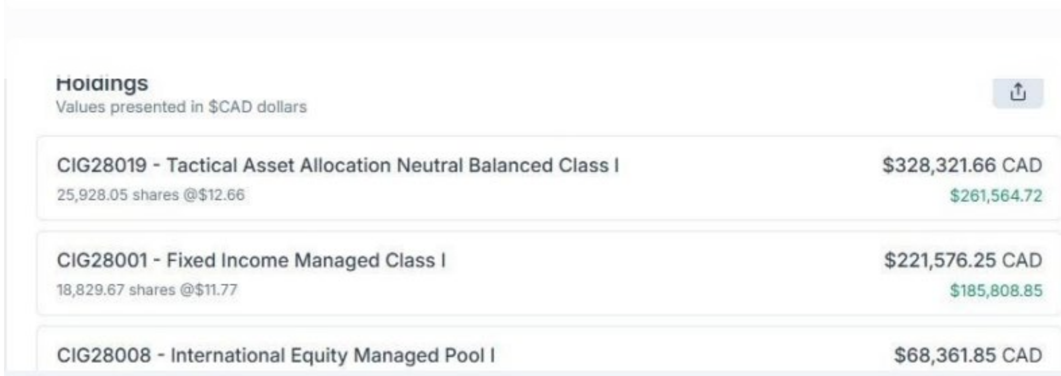
Accounts & Holdings:



Below the graph you will find your accounts and holdings.

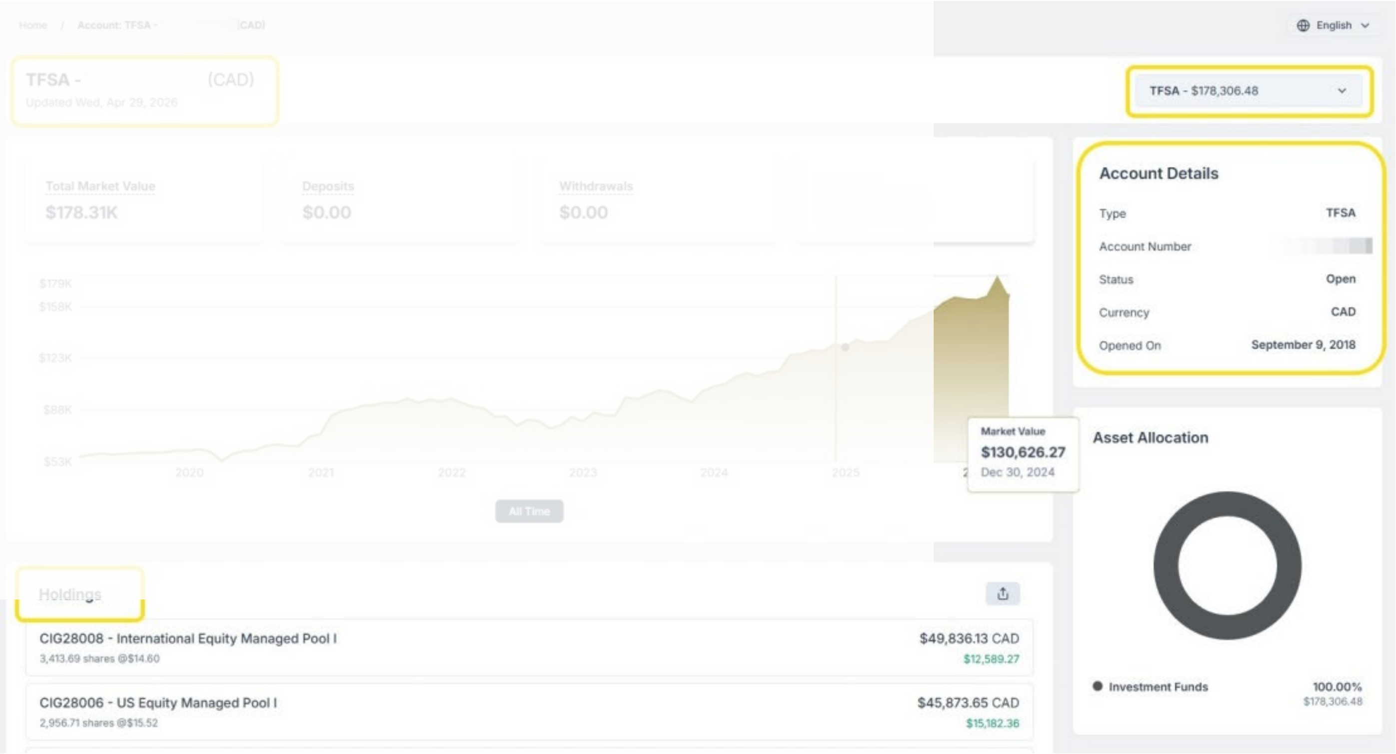
- All accounts are listed with account number, and market value in the currency of the account.
    - A CAD account will show market value in CAD.
    - A USD account will show in USD.
    - Holdings are presented in CAD.

- Click on the account to see details at the account level.

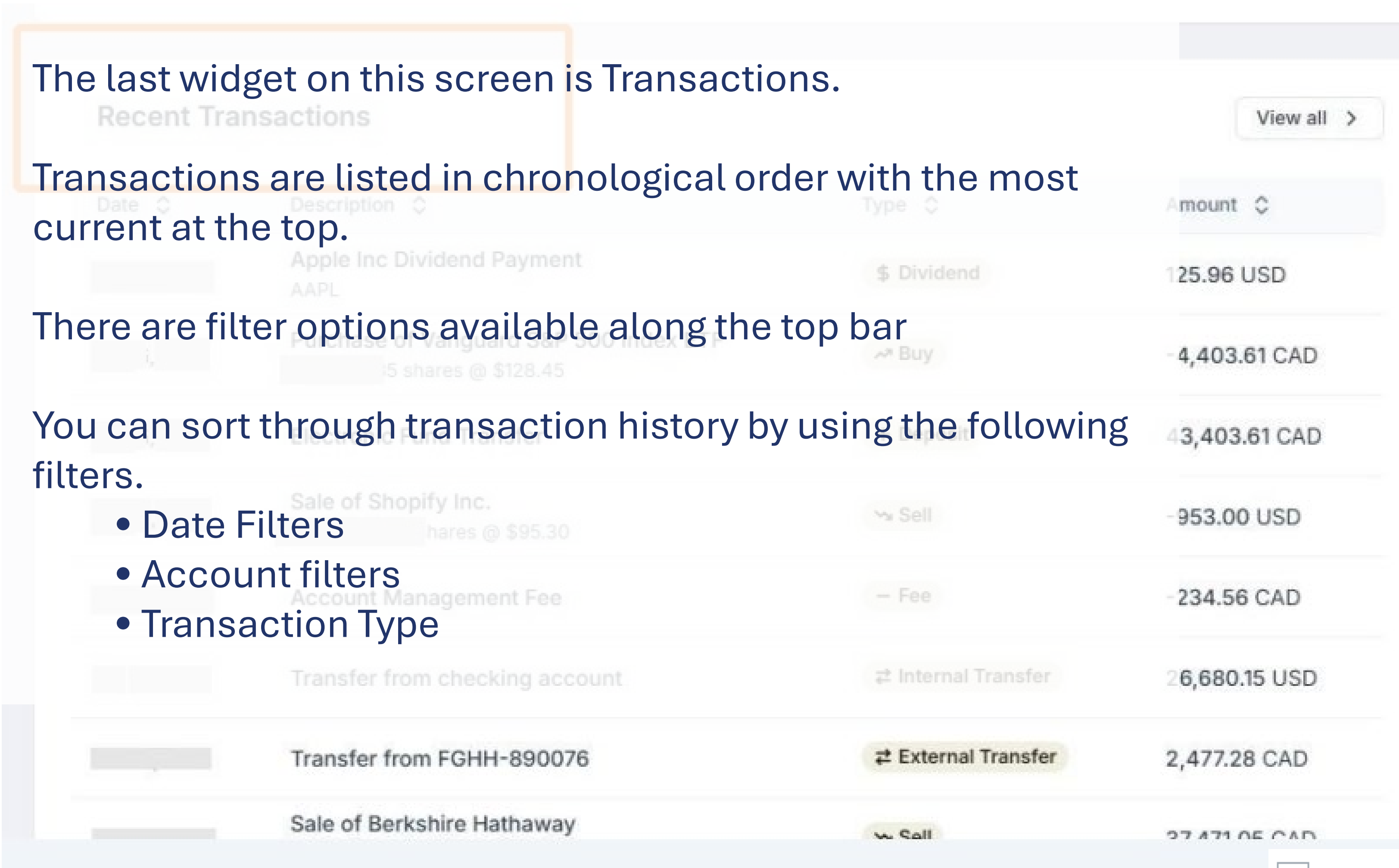


Account Details:

Below the graph you will find your accounts and holdings.



Transactions:



The last widget on this screen is Transactions.

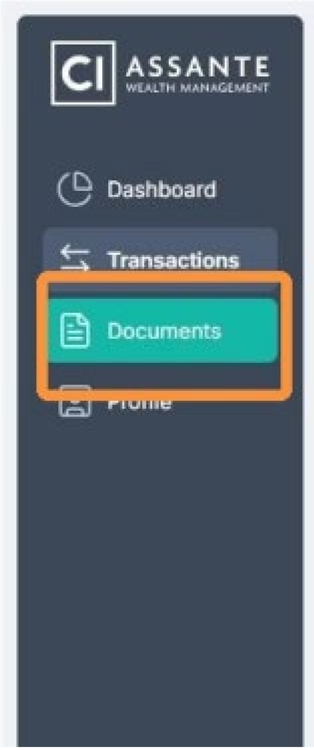
Transactions are listed in chronological order with the most current at the top.

There are filter options available along the top bar

You can sort through transaction history by using the following filters.

- Date Filters
- Account filters
- Transaction Type

Documents:



Click "Documents" to access relevant documents.

These include statements, trade confirms, statement summary, annual CRM2 reports, and tax slips

The Documents tab provides access to statements, tax reports and any other documentation relevant to the account.

New and unread documents will be indicated by a blue dot to the left of the document.

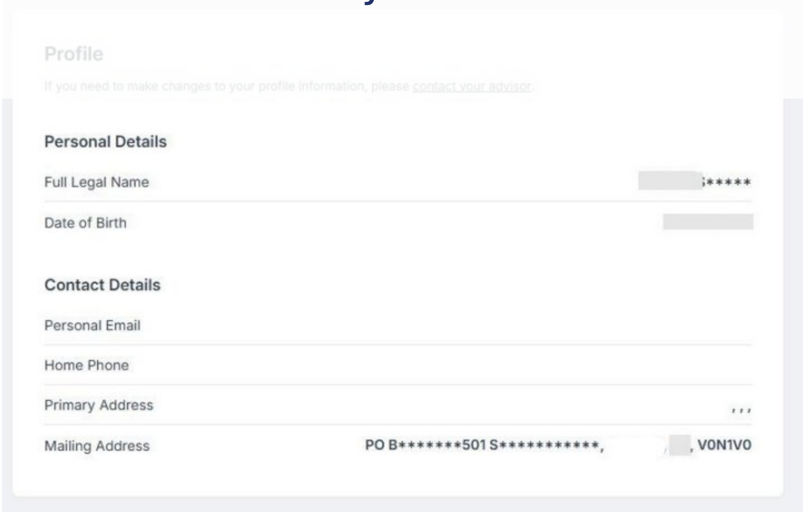
Clients can preview or download the documents by clicking on the 3 dots to the right of the document.

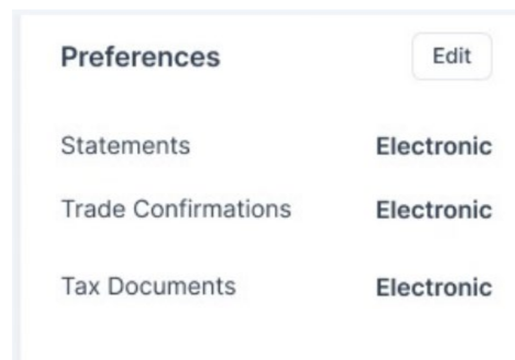
Client Profile:

The Client Profile tab provides general client information including statement preferences.

- Clients can change their preference from this section.
  - Statement Preferences, trade confirmations, and tax documents mailing preferences can be modified by the client.

- For any other non-financial changes (eg. address updates), clients must contact their advisory team to make the necessary changes.

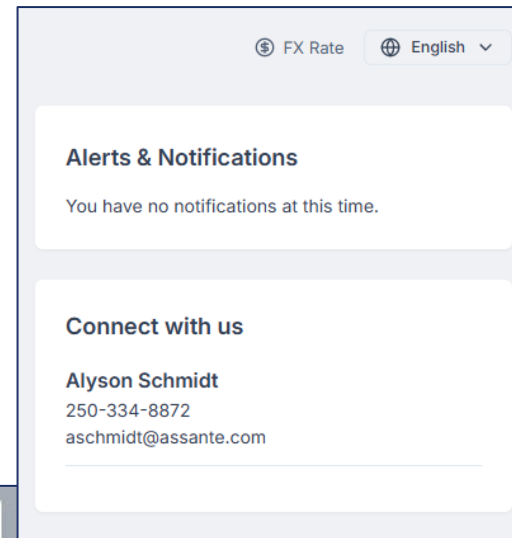


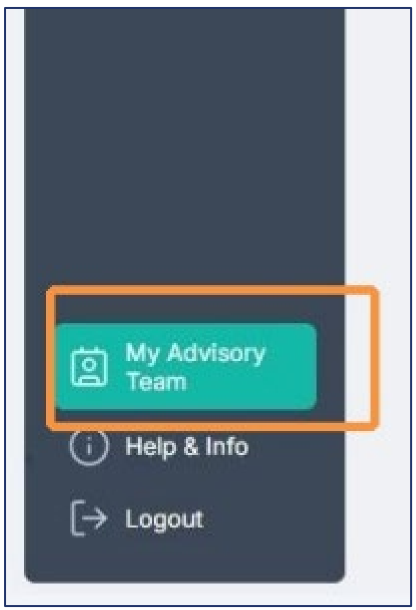


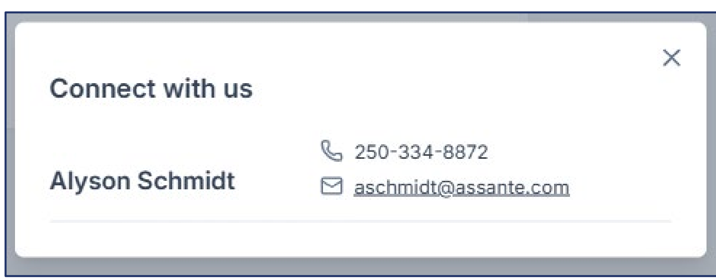
Connect with Us:

To contact us, you can view our phone number on the website or email us at schmidtandassociates@assante.com directly.

You may also click "My Advisory Team“ for full details







Contact Us for Assistance:

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For any assistance,

please call our office at **250-334-8872** or

email **schmidtandassociates@assante.com**