

Assante Client Portal Access Guide



ASSANTE
WEALTH MANAGEMENT

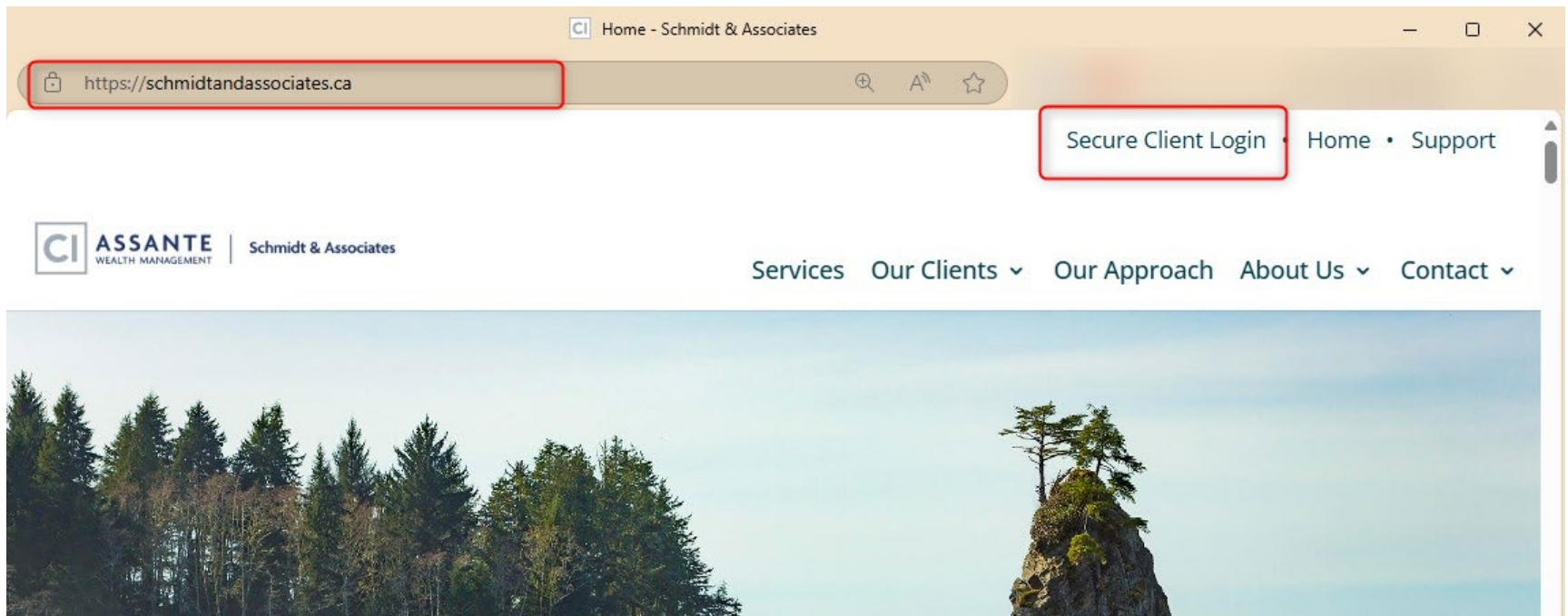
Schmidt & Associates

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/3Rwejji>

Assante Client Portal Login:

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



Registration Invitation:

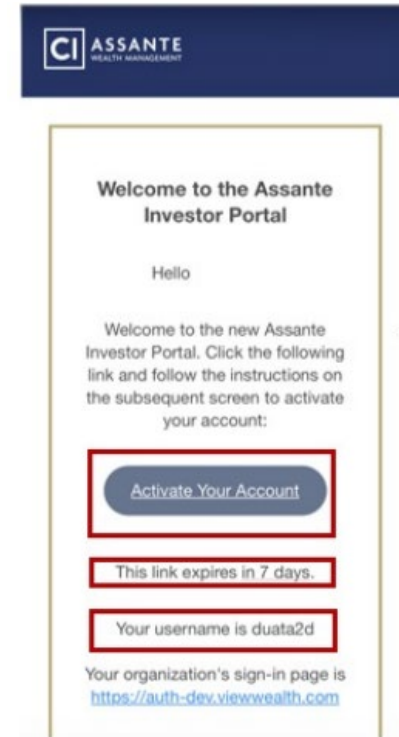
You should receive an email from noreply@assante.com with a link to activate your registration.

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 schmidtdassociates@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 

Submit

Password:

You must set up a password to move forward.

1. Create a Password.

Set up security methods
@ investor_portal_uat_phil_b

Security methods help protect your Assante Portal account by ensuring only you have access.

Required now

Password
Choose a password for your account
[Set up](#)

Security Question
Choose a security question and answer that will be used for signing in
[Set up](#)

[Back to sign in](#)

Set up password
@ investor_portal_uat_phil_b

Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- No parts of your username
- Does not include your first name
- Does not include your last name
- Password can't be the same as your last 4 passwords

Enter password
.....

Re-enter password
.....

[Next](#)

[Back to sign in](#)

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.

Set up security methods

@ investor_portal_uat_phil_b

Security methods help protect your Assante Portal account by ensuring only you have access.

Required now

-  **Google Authenticator**
Enter a temporary code generated from the Google Authenticator app.
[Set up](#)
-  **Phone**
Verify with a code sent to your phone.
[Set up](#)
-  **Security Question**
Choose a security question and answer that will be used for signing in.
[Set up](#)

[Back to sign in](#)

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"

Set up phone authentication
@ investor_portal_uat_phil_b

Enter your phone number to receive a verification code via SMS.

Country/region
Canada

Phone number
+1

Receive a code via SMS

[Return to authenticator list](#)
[Back to sign in](#)

By using this application, I consent to the personal information handling practices outlined in our [Privacy Policy](#). I also confirm that I understand my responsibilities in securing my account

Set up phone authentication
@ investor_portal_uat_phil_b

A code was sent to your phone. Enter the code below to verify.
Carrier messaging charges may apply

Enter Code

Verify

[Return to authenticator list](#)
[Back to sign in](#)

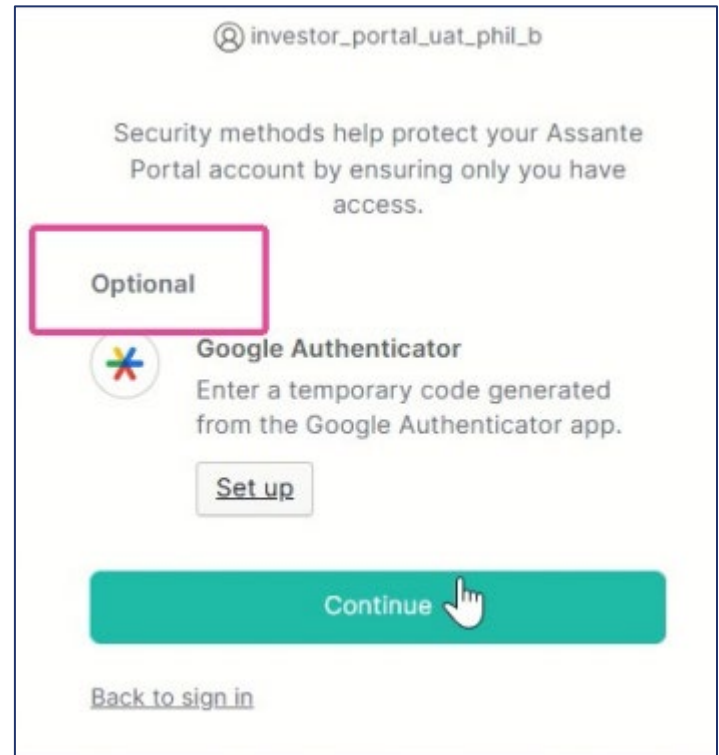
Google Authenticator:

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 a QR code to receive a text code.



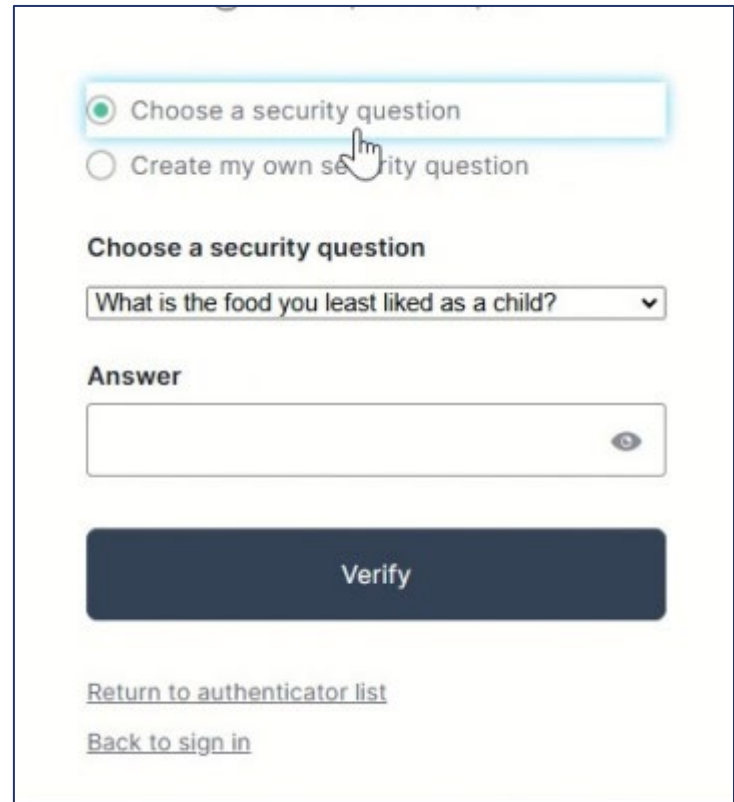
Security Question:

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.

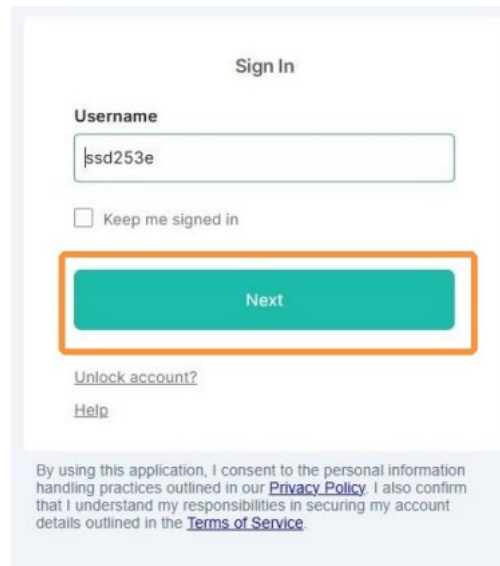
Enter your response and click "Verify".



The screenshot shows a web form for setting a security question. At the top, there are two radio button options: "Choose a security question" (which is selected and highlighted with a blue border) and "Create my own security question". Below these is a dropdown menu labeled "Choose a security question" with the text "What is the food you least liked as a child?". Underneath is an "Answer" field, which is currently empty and has a small eye icon on the right side. A dark blue "Verify" button is positioned below the answer field. At the bottom of the form, there are two links: "Return to authenticator list" and "Back to sign in".

Assante Portal Interface

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



Sign In

Username

ssd253e

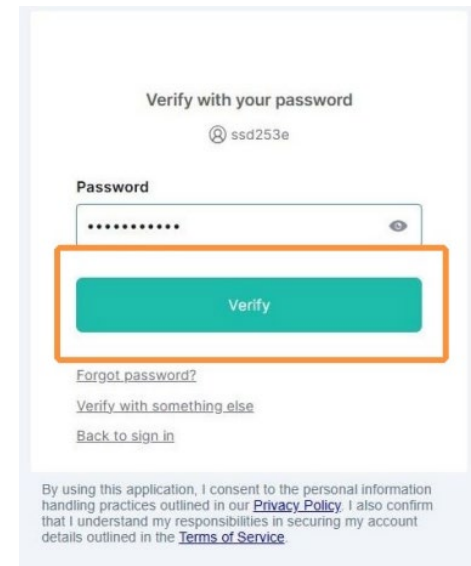
Keep me signed in

Next

[Unlock account?](#)

[Help](#)

By using this application, I consent to the personal information handling practices outlined in our [Privacy Policy](#). I also confirm that I understand my responsibilities in securing my account details outlined in the [Terms of Service](#).



Verify with your password

ssd253e

Password

.....

Verify

[Forgot password?](#)

[Verify with something else](#)

[Back to sign in](#)

By using this application, I consent to the personal information handling practices outlined in our [Privacy Policy](#). I also confirm that I understand my responsibilities in securing my account details outlined in the [Terms of Service](#).

Multi-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.

Verify with your phone

ssd253e

Send a code via SMS to **+1 XXX-XXX-3630**.

messaging charges may apply

[Receive a code via SMS](#)

[Back to sign in](#)

ssd253e

A code was sent to **+1 XXX-XXX-3630**. Enter the code below to verify.

Carrier messaging charges may apply

Enter Code

783528

[Verify](#)

[Back to sign in](#)

Log In:



<https://assante.viewwealth.com>

Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

[Help](#)

Verify with your password

Password

Verify

Verify with your phone

ckiedb6

Send a code via SMS to **+1 XXX-XXX-7970**.

Carrier messaging charges may apply

Receive a code via SMS

[Back to sign in](#)

Verify with your phone

ckiedb6

A code was sent to **+1 XXX-XXX-7970**. Enter the code below to verify.

Carrier messaging charges may apply

Enter Code

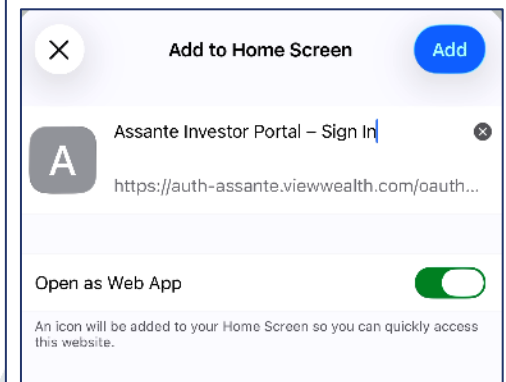
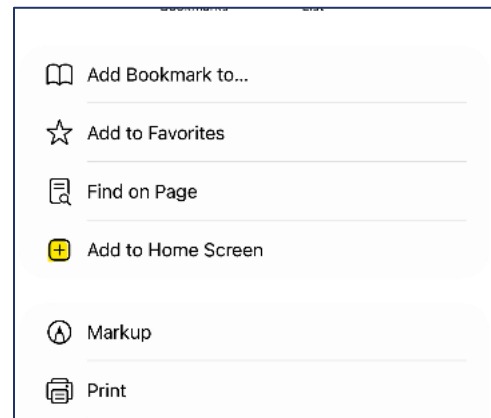
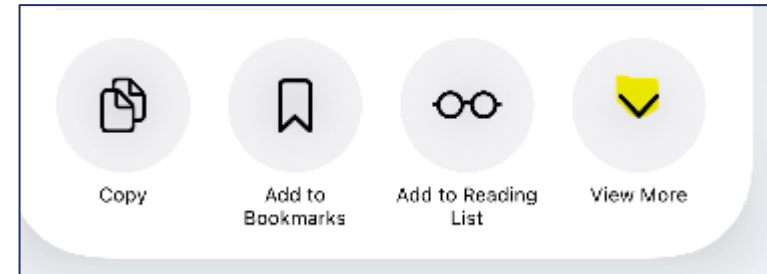
Verify

[Back to sign in](#)

Save As an Icon on Phone:

Add a website icon to your iPhone Home Screen

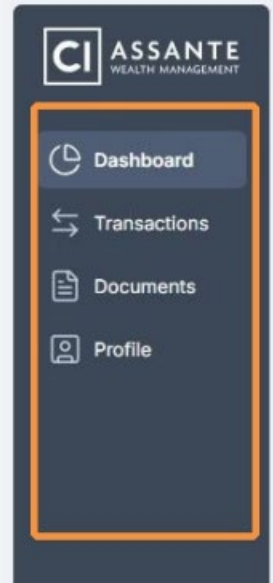
- Open your browser
- Go to the website: <https://auth-assante.viewwealth.com/>
- Tap the Share icon (with arrow pointing up)
- Select “Add to Home Screen”
- Scroll down in the menu and tap Add to Home Screen.
- Name the icon
- You can edit the name so it’s easy to recognize.
- Tap “Add”
- The icon will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



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.



Good Afternoon, S****

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.

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- It includes contribution schedules and **system** maintenance notifications.

Return to this page by clicking "Dashboard" on the top left of the menu.

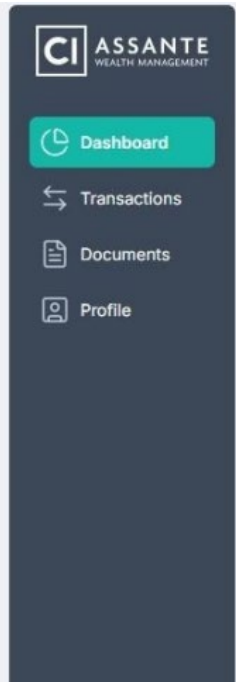
Alerts & Notifications

You have no notifications at this time.

Connect with us

Alyson Schmidt
250-334-8872
aschmidt@assante.com

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.

The screenshot shows the 'My accounts' section of the dashboard. It lists several accounts with their account numbers (partially redacted as S*****) and market values in CAD. The accounts include RRIF, Registered Retirement Savings Plan, and Tax-Free Savings Account (TFSA).

Account Name	Account Number	Market Value (CAD)
RRIF -	S*****)	\$286,709.22 CAD
Registered Retirement Savings Plan	S*****)	\$108,402.74 CAD
TFSA -	S*****)	\$178,306.48 CAD
Tax-Free Savings Account (CAD)	S*****)	\$48,445.07 CAD
S*****) S*****)'s accounts		
Cash (CAD)	S*****)	\$613,127.68 CAD

- A CAD account will show market value in CAD.
- A USD account will show in USD.
- Holdings are presented in CAD.

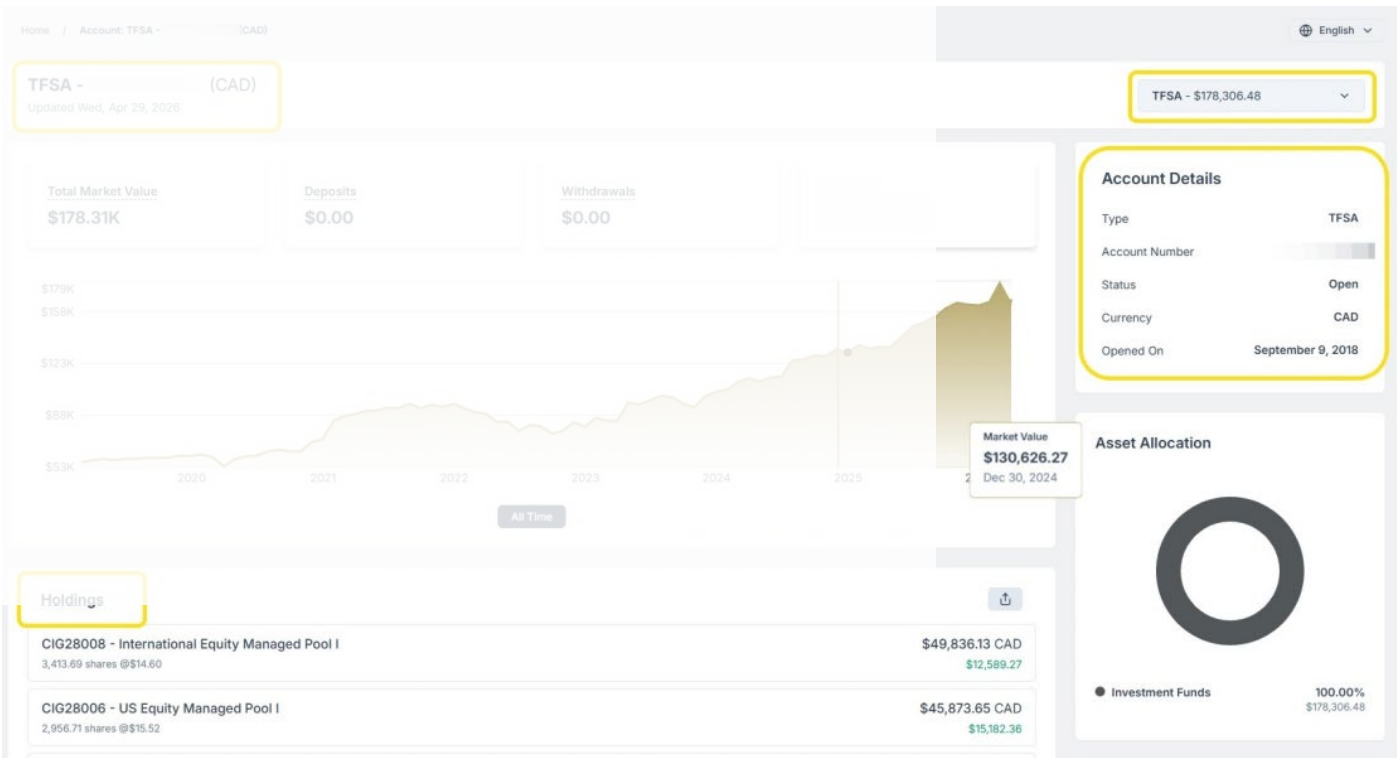
- Click on the account to see details at the account level.

The screenshot shows the 'Holdings' section of the dashboard. It lists three holdings with their ticker symbols, names, share counts, and market values in CAD. The values are presented in \$CAD dollars.

Holdings	Market Value (CAD)
CIG28019 - Tactical Asset Allocation Neutral Balanced Class I 25,928.05 shares @\$12.66	\$328,321.66 CAD \$261,564.72
CIG28001 - Fixed Income Managed Class I 18,829.67 shares @\$11.77	\$221,576.25 CAD \$185,808.85
CIG28008 - International Equity Managed Pool I	\$68,361.85 CAD

Account Details:

Below the graph you will find your accounts and holdings.



Transactions:

The last widget on this screen is Transactions.

Recent Transactions

View all >

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

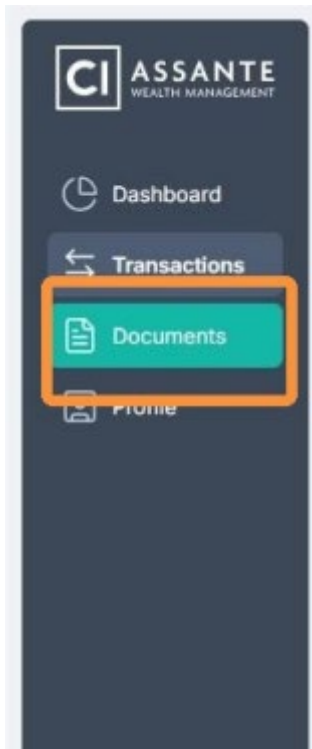
There are filter options available along the top bar

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

- Date Filters
- Account filters
- Transaction Type

Date	Description	Type	Amount
	Apple Inc Dividend Payment AAPL	\$ Dividend	125.96 USD
	Purchase of Vanguard S&P 500 Index F 5 shares @ \$128.45	Buy	-4,403.61 CAD
	Sale of Microsoft Corporation 10 shares @ \$340.31	Sell	3,403.61 CAD
	Sale of Shopify Inc. 3 shares @ \$95.30	Sell	-953.00 USD
	Account Management Fee	- Fee	-234.56 CAD
	Transfer from checking account	Internal Transfer	26,680.15 USD
	Transfer from FGHH-890076	External Transfer	2,477.28 CAD
	Sale of Berkshire Hathaway	Sell	27,471.05 CAD

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.

Date	Account	Description	Type	Amount
	TFSA -	Electronic Fund Transfer	+ Deposit	43,403.61 CAD
				-4,403.61 CAD
		Management Fee	- Fee	-234.56 CAD
	LIRA -	Transfer from checking account	# Internal Transfer	26,680.15 USD
		Sale of Berkshire Hathaway	Sell	37,471.05 CAD

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.

Profile
If you need to make changes to your profile information, please [contact your advisor](#).

Personal Details

Full Legal Name

Date of Birth

Contact Details

Personal Email

Home Phone

Primary Address

Mailing Address

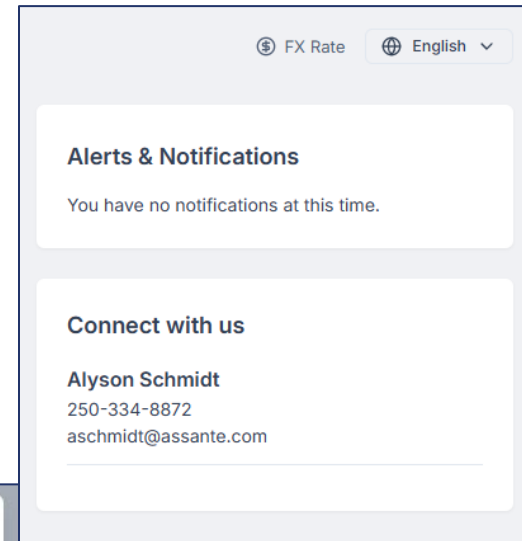
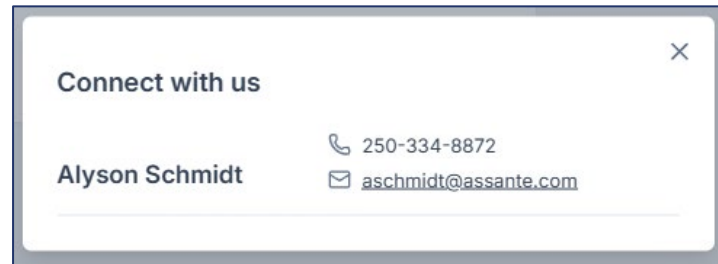
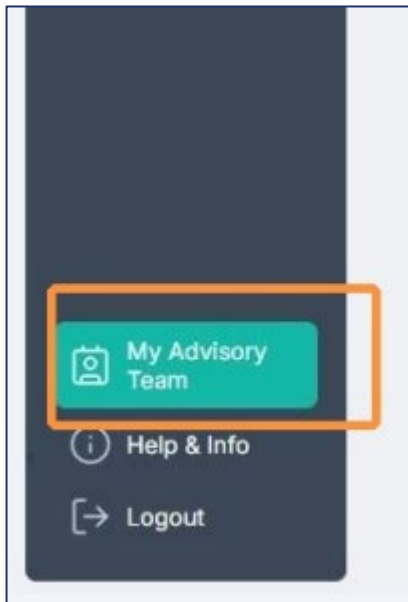
Preferences

Statements	Electronic
Trade Confirmations	Electronic
Tax Documents	Electronic

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:



ASSANTE
WEALTH MANAGEMENT

Schmidt & Associates

For any assistance,
please call our office at **250-334-8872** or
email **schmidtandassociates@assante.com**