Canaccord Genuity Wealth Management

Canaccord Genuity Wealth Management client portal

User guide

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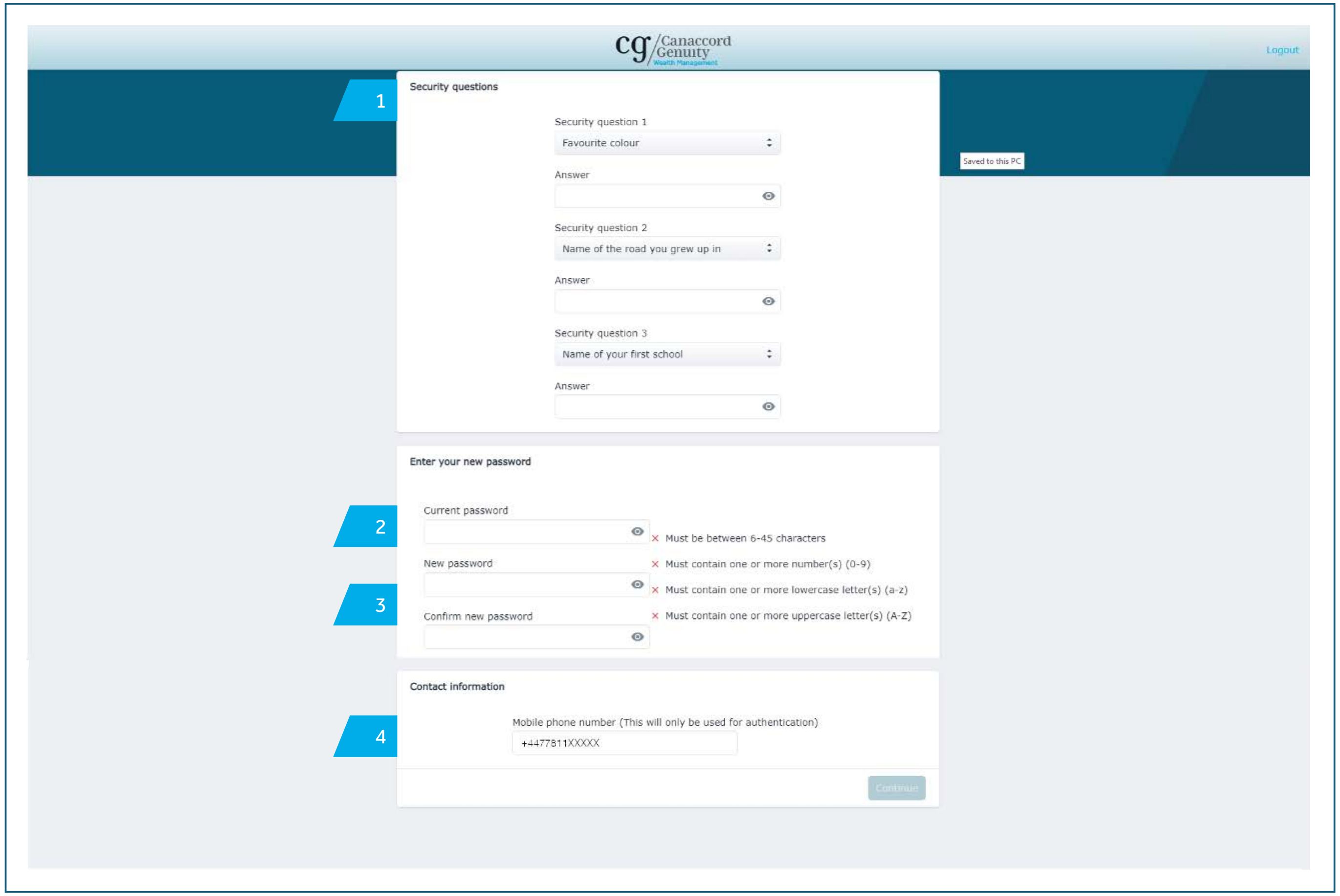
Logging in for the first time

If you have received an email from us with a temporary password and a link inviting you to register, you will need to follow the link provided and log in with your username and temporary password. You will need to go through multi factor authentication (MFA) and answer a security question. Once this has been completed, you will be asked to complete three security questions, set a new password and enter a contact number for MFA purposes. If you haven't received an email from us, you will need to contact us for a username.

Our mobile app, CGWM Investments, is also available from the Apple and Google stores.



Please select your security questions and then type your answers in the text boxes below. **1**

Please add the temporary password provided in the email. **2**

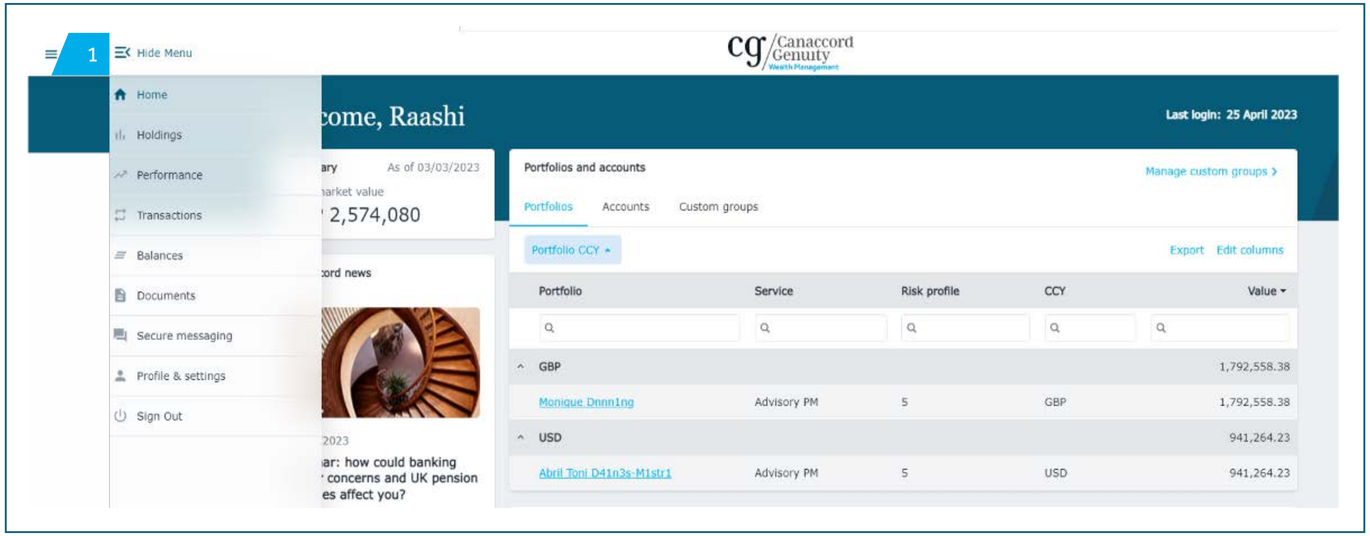
Please input your new password and then confirm your new password in the second box. **3**

Please add your mobile number here, dropping the first zero, e.g +44 77XXXXXXXX. **4**

Navigation

In the top left hand corner is the site menu, selecting this will allow you to navigate to the different sections of the site.

1



Home page

Once you have successfully logged in, you will be directed to the home page. From here you can use the site menu to navigate through the site or you have the following options:

The 'Portfolios' tab shows your accounts at an account group or reporting level. For example, if you have two accounts and they are reported together, this is referred to as an account group and these are listed here.

1

The 'Accounts' tab shows your accounts at an individual level which make up each of the account groups.

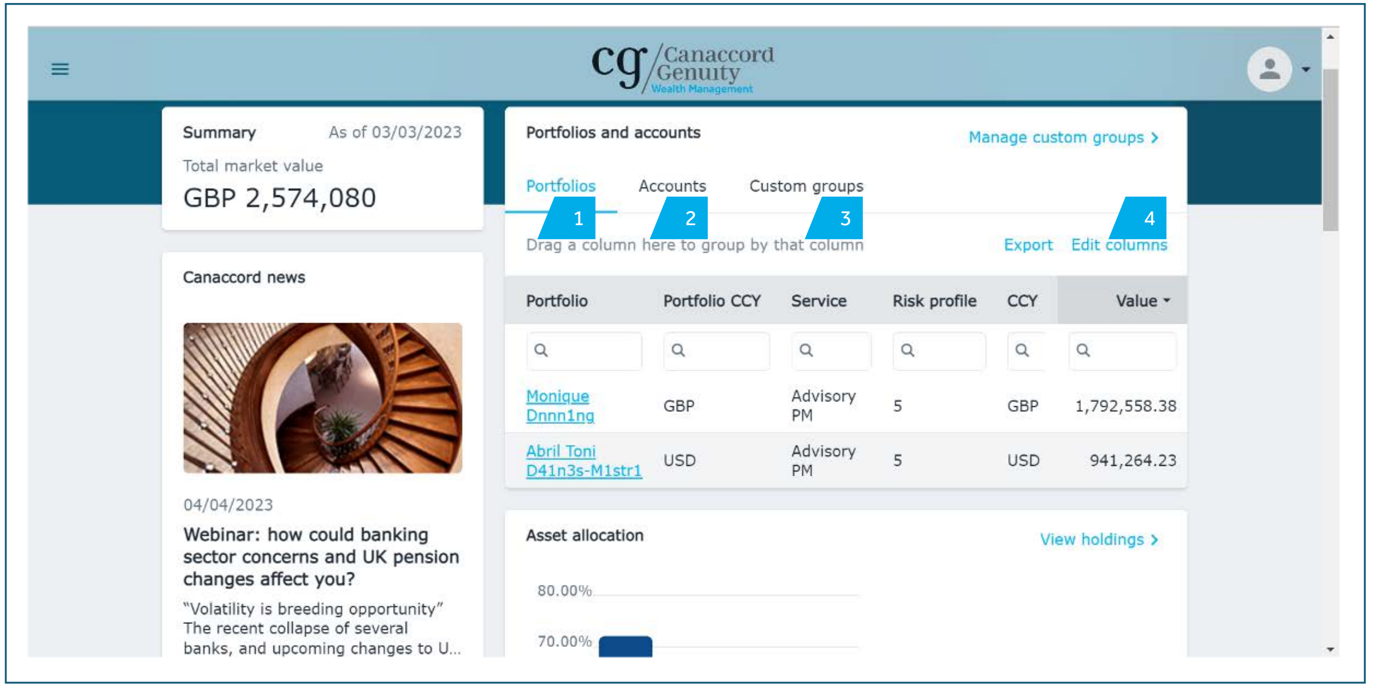
2

The 'Custom groups' tab allows you to create your own account groups to view and navigate the portal e.g. all discretionary accounts.

3

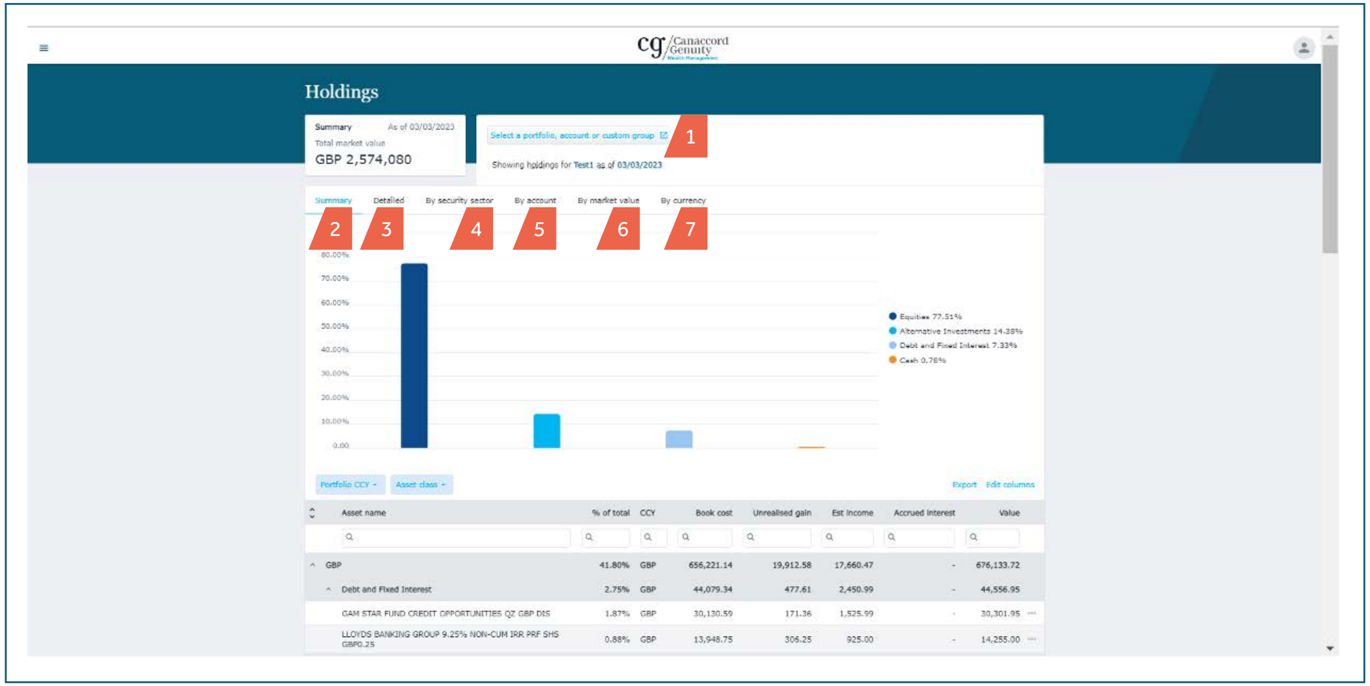
The 'Edit columns' option allows you to edit the columns you can see in the table. You can also drag and drop a column heading into the space above the column headings which allows you to group the accounts on the basis of the option selected i.e. by service type. This feature is repeated throughout the site.

4



Holdings

The holdings page can be accessed from the site menu or by clicking on one of the accounts detailed on the 'Accounts' tab on the home page. You can see your holdings broken down in various ways, both graphically and in the table below. You can add or remove columns in the table to your own preferences using the 'edit columns' option as well by dragging the columns up to group by different options. Search options are available for each of the columns.



This allows you to choose the portfolio, account or custom group you wish to view the holdings for. 1

This allows you to view the holdings in different ways. 2-7

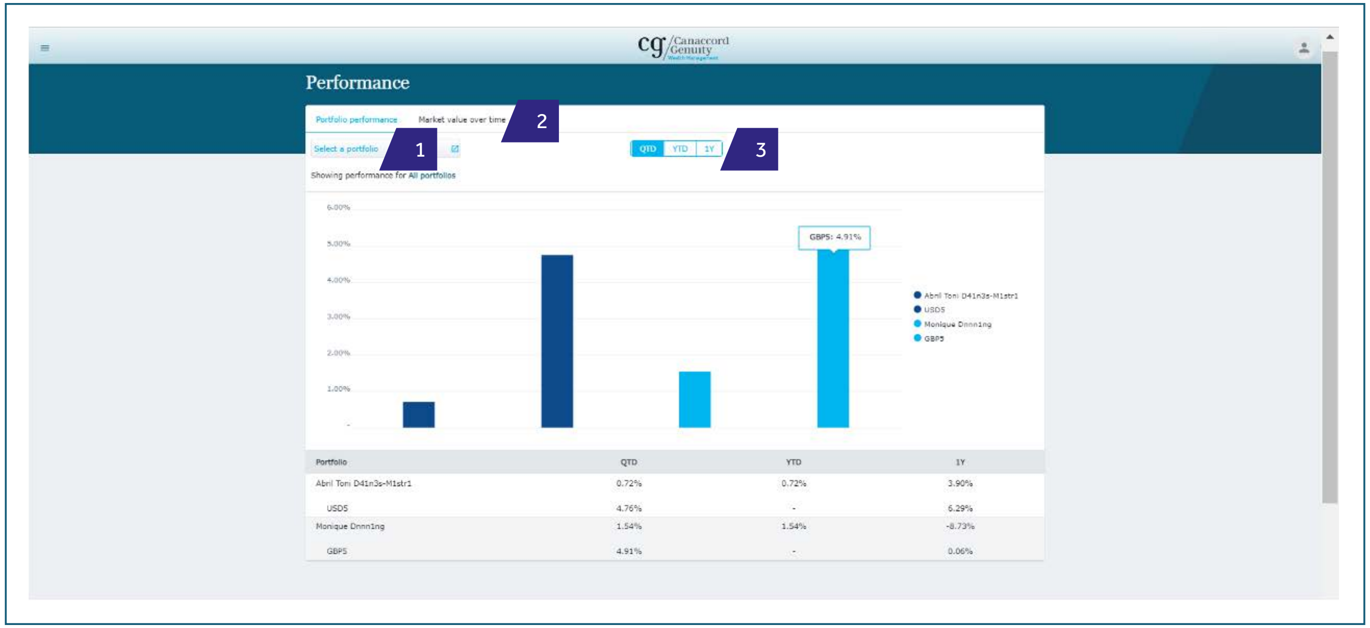
Performance

The performance page allows you to review the performance of your portfolios over set time periods, you can also view the market value over time.

You can select the portfolio you wish to review performance for. **1**

Shows market value over time. **2**

Reports performance over different time periods. **3**



Performance: market value over time

This allows you to view the market value over different time periods.

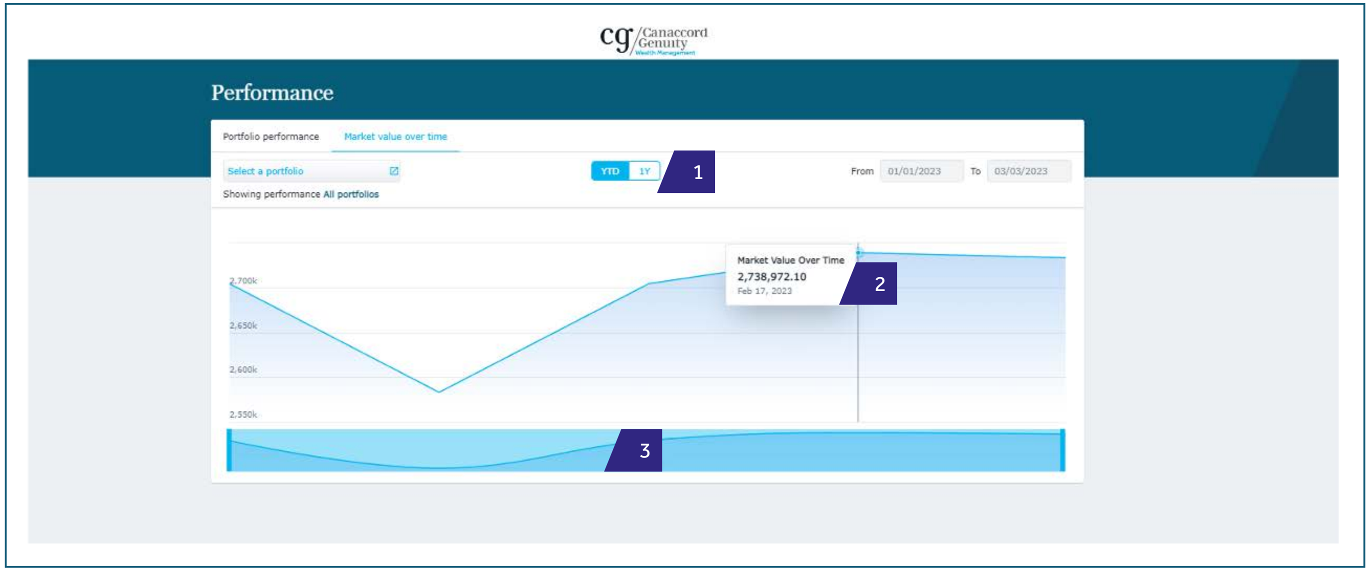
1

By hovering over a point in the graph you can see the total market value of your portfolio for that day.

2

The blue bar at the bottom allows you to select/adjust time periods selected.

3



Transactions

The transactions page allows you to view your transactions by portfolio, account or custom group and over varying time periods. In the table you can search, filter and amend the columns as you can on the holdings page.

This allows you to choose the portfolio, account or custom group you wish to view transactions for, the type of transaction and the time period. You need to click apply to show the transactions you have selected. 1

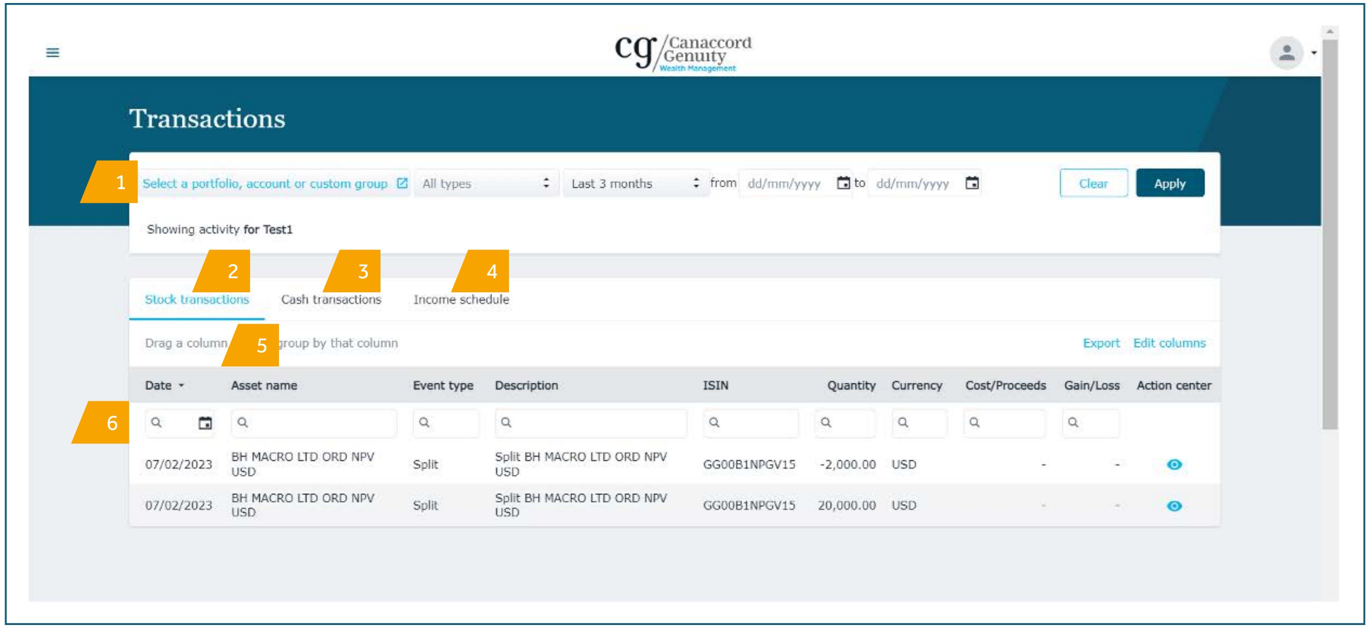
Select to show stock transactions. 2

Select to show cash transactions. 3

Shows all income received. 4

You can drag and drop a column into this space to group accounts by the column selected. 5

Search using these fields. 6



Balances

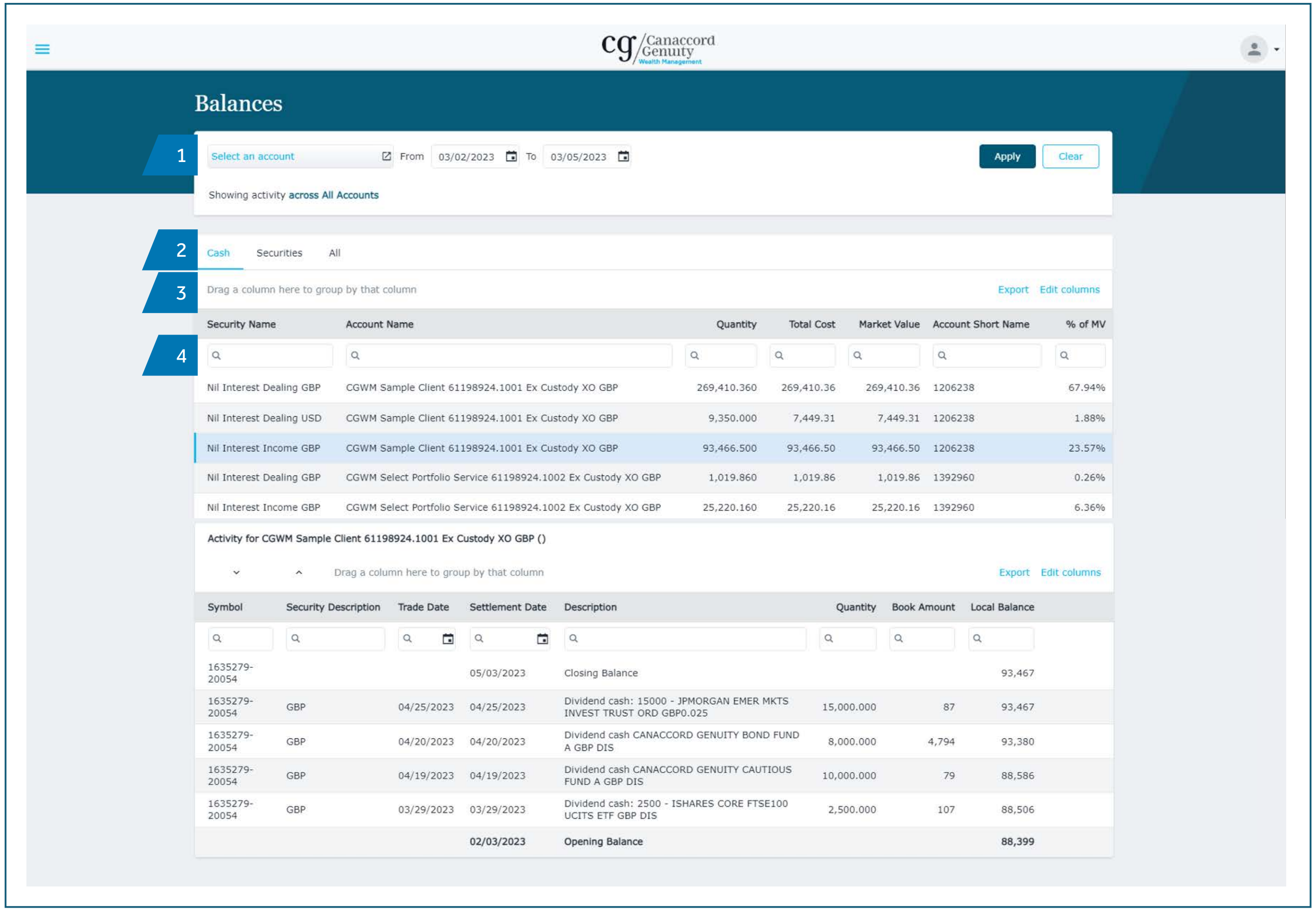
The Balances page allows you to view current holdings and balances at the top of the page and activity over varying time periods for the holding or cash account selected at the bottom of the page. The same group, search and filtering functions are available as on the other pages.

This allows you to choose the portfolio, account or custom group you wish to view. **1**

Select stock or cash to view holdings or cash balances and the corresponding activity. **2**

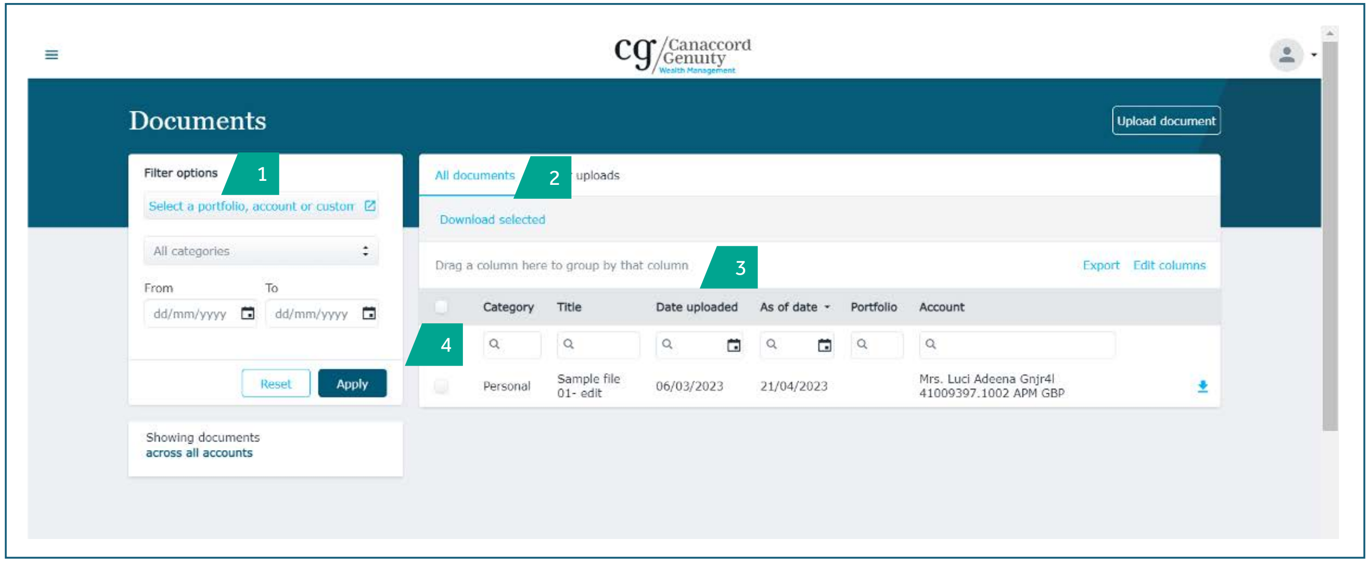
You can drag and a drop a column heading into the gap above to group accounts by that title e.g asset name. **3**

You can search using these fields. **4**



Documents

The documents page allows you to view documents uploaded by Canaccord Genuity Wealth Management (CGWM) such as valuations and contract notes, it will also allow you to upload any documents you wish to store on the site.



This allows you to choose the portfolio, account or custom group, document category and date range you wish to view documents for.

1

Click here to view all documents uploaded to the portal by CGWM or by you.

2

Drag and a drop a column heading into the gap above to group documents by that title.

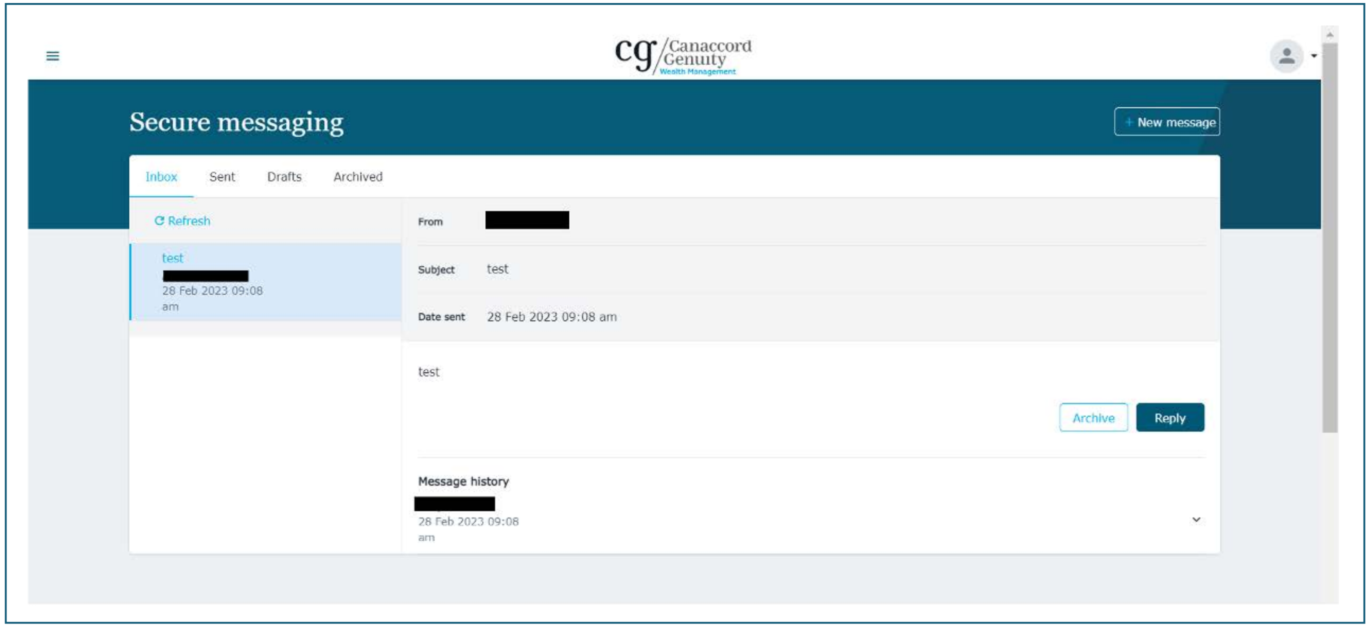
3

You can search using these fields.

4

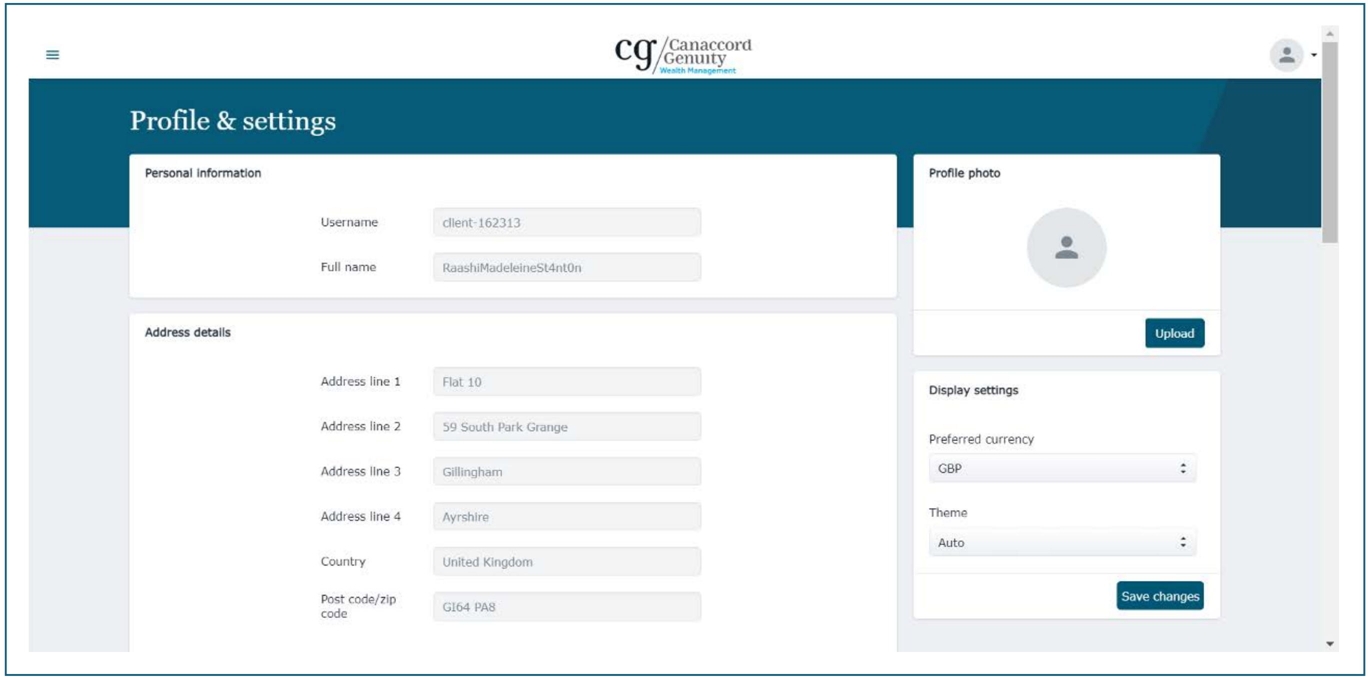
Documents

From this page you can send and receive secure messages to/from your Account Executive and review old messages.



Profile & settings

You can view your address, contact information, change your preferred currency (for display purposes only as the actual reference currency of your portfolios will not change), view screens in light or dark themes, update your password and security questions.



How can we help?

Need help? Get in touch: E: cgwmonline@canaccord.com **T:** 0330 390 0850

If you'd like to know more about how we can help with your investment and wealth management needs, email us at marketing@canaccord.com or call one of the numbers shown below. We'll be delighted to answer your questions and provide more details of our services.

Crown dependencies

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Important Information

Investment involves risk. The value of investments and the income from them can go down as well as up and investors may not get back the amount originally invested. Past performance is not a reliable indicator of future performance.

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CGGI is incorporated under the law of the Province of British Columbia with incorporation number BC0787108. The registered address is 1000-840 Howe Street, Vancouver, B.C., Canada V6Z 2M1. It is listed on the Toronto Stock Exchange under the symbol 'CF'. The products and services offered by CGWM in the UK may differ from those offered by other Canaccord Genuity Group Inc. offices.

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