

Assante Client Portal Registration

A simple guide to setting up your online access

What you will need

- Your activation email
- Your Web Login ID
- One account number
- A mobile phone or authenticator app

Step 1

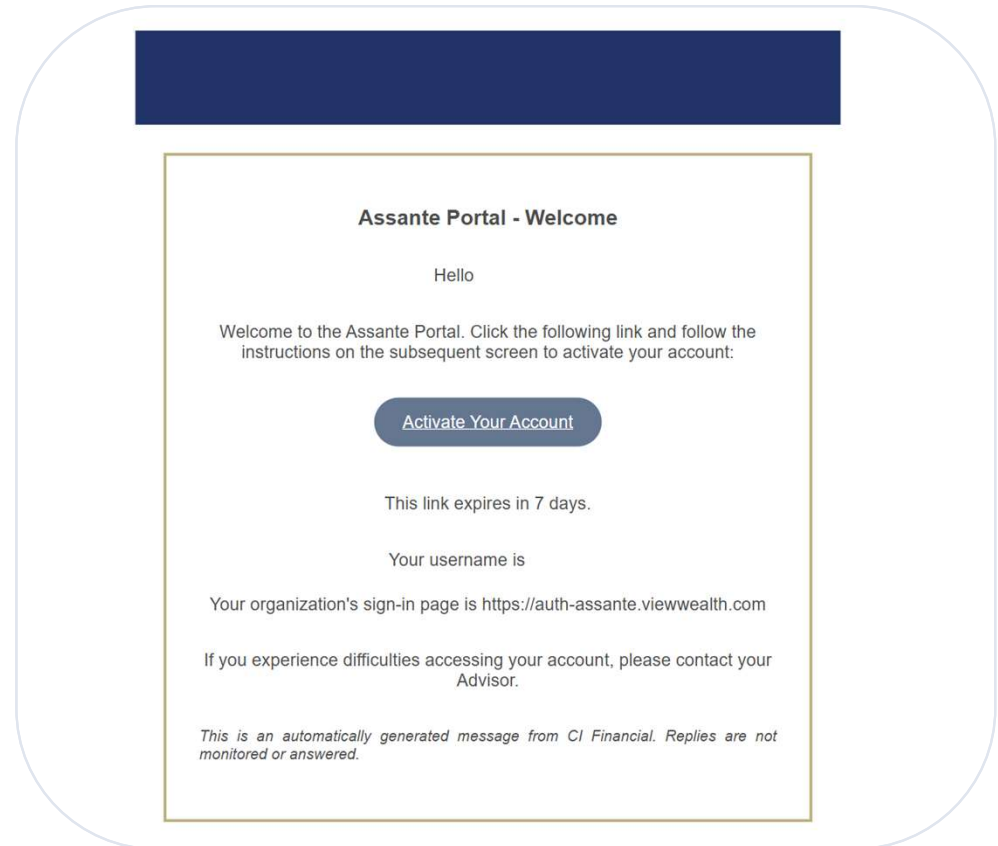
Check your email

You will receive an email from:

noreply@assante.com

Open the email and look for the button to activate your account.

If you do not see the email, please check your junk or spam folder.



Step 2

Activate your account

Click “Activate Your Account” in the email.

You will be taken to the registration page, where you will enter your Web Login ID and Account Number.

The following slide shows where to find these details.

Assante Portal Registration

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

Client Number/Web Login ID ⓘ

Account Number ⓘ

First 4 Digits of SIN ⓘ

Submit

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Need help signing in? Contact us at service@assante.com ©2026 CI Assante Wealth Management

Step 3

Find your login details

Your Web Login ID and Account Number can be found on a past statement.

Any account number may be used.

If you need help finding these details, please contact our office.



GESTION DE PATRIMOINE
ASSANTE
WEALTH MANAGEMENT

PORTFOLIO STATEMENT FOR
November 1, 2025 to November 30, 2025

Web Login ID:

Find out more on *Assante InvestorOnline (AIO)*
Not registered? Visit [Assante.com/login](https://assante.com/login) and click on "Register Now" to go online in 3 easy steps. You will need your Assante account number which can be found on this statement. Once registered, we invite you to opt-in for electronic delivery of all your account and tax documents.
If you require assistance registering or logging in to AIO, please contact us at service@assante.com, or by calling the AIO Support Line at 1-888-365-2128.

Total market value of your portfolio on November 30, 2025

Change in value of your portfolio as of November 30, 2025

ACCOUNT	ACCOUNT NUMBER	MKT VALUE ON DECEMBER 31, 2024 (\$)	NET YTD DEPOSITS/ (WITHDRAWALS) (\$)	NET YTD CHANGE IN MKT VALUE (\$)	MKT VALUE ON NOVEMBER 30, 2025 (\$)
TFSA		0.00			
FFSA		0.00			
Open		0.00			
Total value of your portfolio		50.00			

Total value of your portfolio on October 31, 2025

NET YTD DEPOSITS(WITHDRAWALS) is the total amount of new deposits, pre-authorized chequing purchases, and transfers in of cash or investments that occurred during the year, less the total amount of cash withdrawals, systematic withdrawals, and transfers out of cash or investments that occurred during the year.
NET YTD CHANGE IN MKT VALUE is the MKT VALUE ON the Statement Date, less the MKT VALUE ON DEC 31 of the previous calendar year, less NET YTD DEPOSITS(WITHDRAWALS).

Step 4

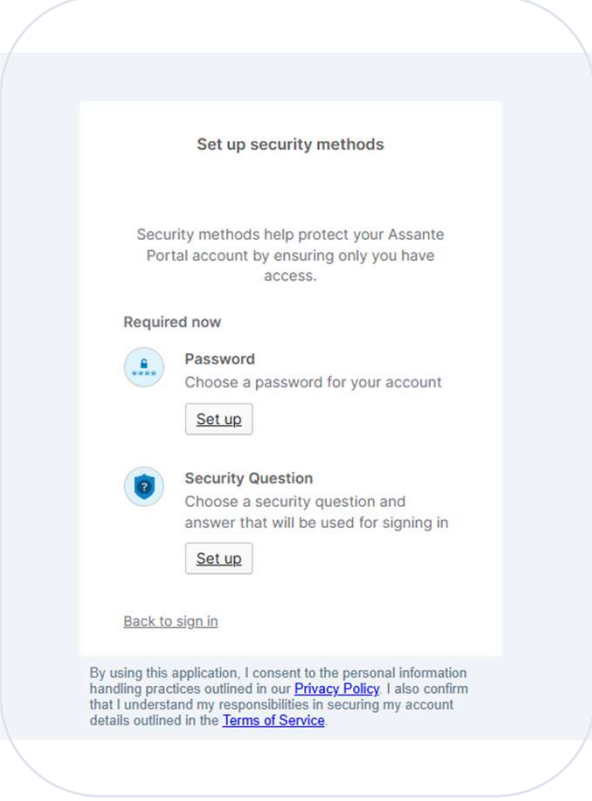
Create your password

After you submit your registration information, you will be asked to create:

- A password
- A security question

These help keep your portal access secure.

Choose a secure password you can remember.



The screenshot shows a mobile app interface for setting up security methods. At the top, it says 'Set up security methods'. Below that, a message states: 'Security methods help protect your Assante Portal account by ensuring only you have access.' Under the heading 'Required now', there are two sections. The first is 'Password', with a lock icon and the text 'Choose a password for your account', followed by a 'Set up' button. The second is 'Security Question', with a question mark icon and the text 'Choose a security question and answer that will be used for signing in', followed by a 'Set up' button. At the bottom of the screen, there is a link that says 'Back to sign in'. A footer at the very bottom contains a consent statement: '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](#)'.

Step 5

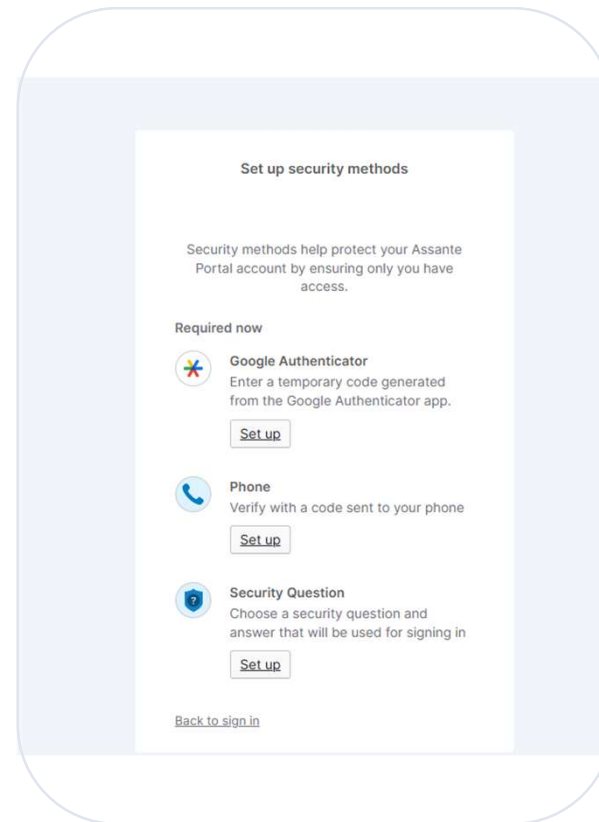
Set up two-factor authentication

For added security, you will need to choose one of the following options:

- Google Authenticator
- Mobile Phone Verification

Follow the prompts on screen to complete this step.

This extra step helps protect your account.



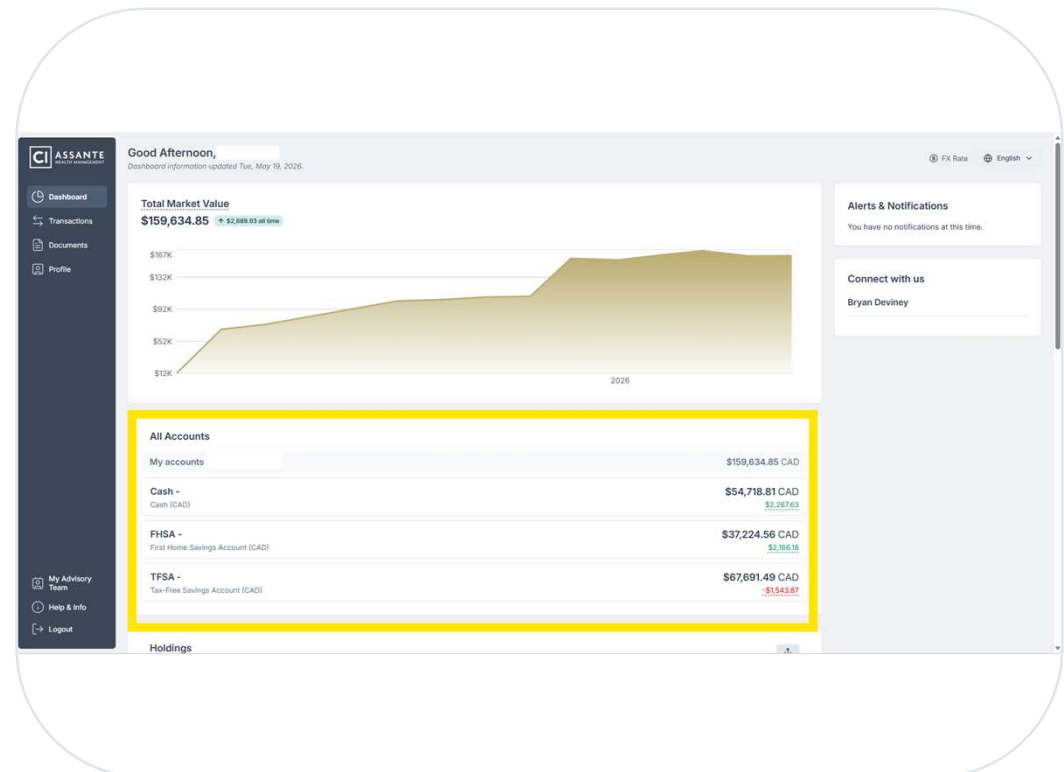
Step 6

View your dashboard

Once setup is complete, you will arrive at your main dashboard.

From here, you can see an overview of your accounts.

You can select an account to view the investments inside it.

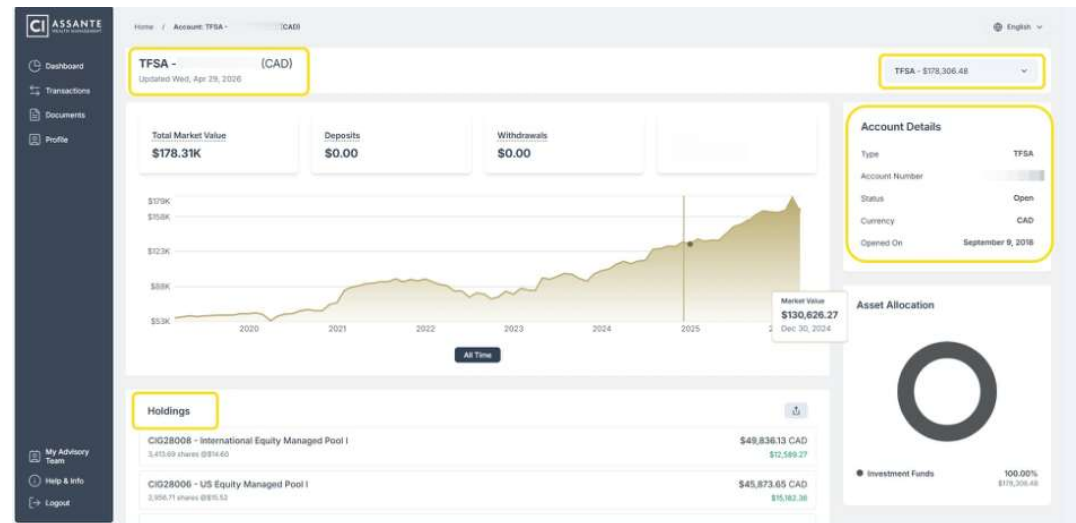


Step 7

Inside the Account

Clicking into a specific account allows you to view:

- Market Value
- Asset Allocation
- Holdings
- Recent Transactions
- Performance Metrics



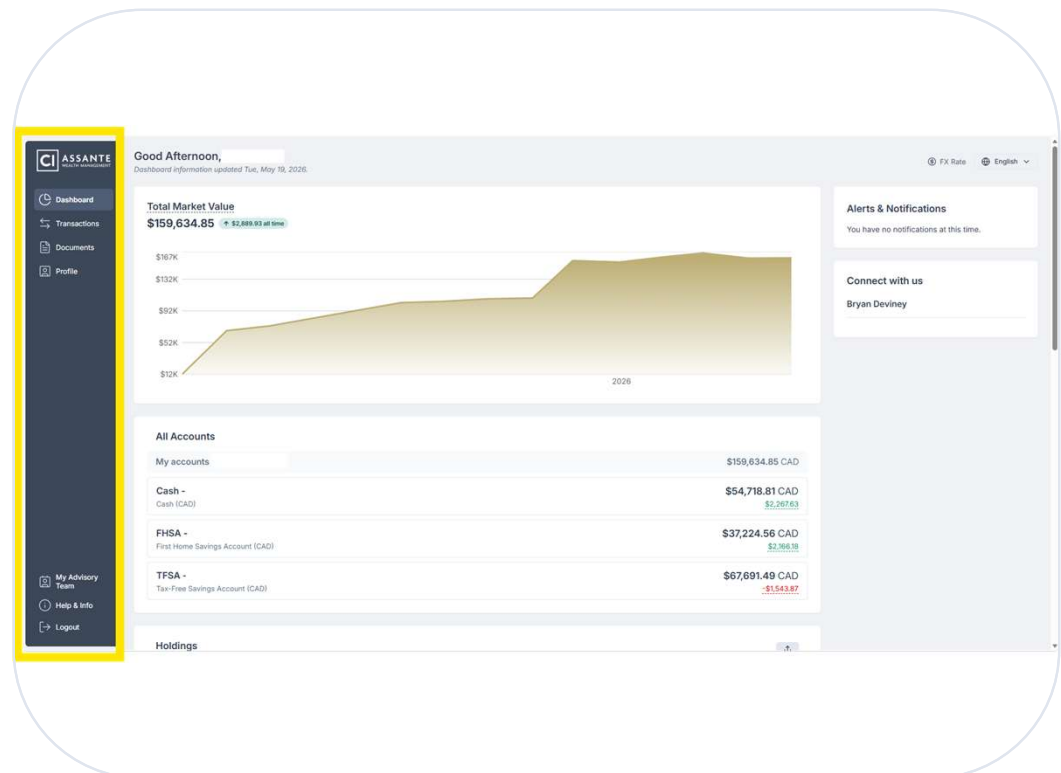
Step 8

Access transactions and documents

Use the menu on the left side of the portal to access:

- Transactions
- Documents
- Your profile

This is where you can review account transactions and view previously issued documents



Questions? We're here to help

Please contact our team if you need help registering or using the client portal.

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Thank you.