

New Feature!

# InvestorOnline | MY PORTAL

An easy and secure way to communicate with your Advisor over Assante InvestorOnline



E-mail is a crucial means of communication between clients and advisors. We are always looking for a convenient and secure solution for sharing our confidential communications and documents. Assante InvestorOnline My Portal is that solution. It has been designed to provide you and your financial advisor with a secure and private communication gateway through Assante InvestorOnline, allowing everyone to work more efficiently and with a greater peace of mind.

## FEATURES AND BENEFITS

- **EASY ACCESS**

As an Assante InvestorOnline user, you already have access to My Portal, and a new menu tab has been added to your screen. Not already registered for Assante InvestorOnline? Visit Assante.com

- **SECURE COMMUNICATION**

My Portal uses a direct messaging method to send and store your important communications and documents within the secure framework of Assante InvestorOnline. You can easily communicate knowing that your information will be kept private and safe.

- **SECURELY SHARE FILES**

We understand that sharing documents in person with your advisor is not always possible. The new My Vault solves that problem with secure file sharing and a document vault.

### How to Access My Portal

1. Visit Assante.com > Client Login > Login Now
2. Log into Assante InvestorOnline
3. Click on My Portal tab

### How to communicate with your advisor

1. Click on My Portal tab
2. Write your message under Post section
3. Once completed, click on the Share button.  
*A generic email notification is sent to your advisor inviting him/her to log into the My Portal to view the contents of your message.*

### How to share documents with your advisor

1. Click on My Portal tab
2. Click on My Vault tab
3. You have a choice to upload or download a file by clicking on the appropriate icon.

#### Click Upload Icon

1. Select the file from your computer/device
2. Select file name, category, and add any comment for your advisor
3. Upload the file

Note: You can click on the Back button or My Vault tab to exit this page.

#### Click Download Icon

1. A browser download message will appear
2. Click Open or Save

Result: If you select Open, the document will open. If you select Save, the document will be saved to your computer/device.

For further assistance, please contact Assante Service Centre at 1-800-268-3200, Monday to Friday 8a.m. to 6p.m. EST or e-mail us at [service@assante.com](mailto:service@assante.com)

