

Aviso Online

Quick reference guide

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Aviso Online overview

Aviso Online is the online portal that provides you with access to your Aviso Wealth account information, including holdings, transactions, and statements. This guide provides a high-level overview of the features within Aviso Online.

Account login

If it is your first-time visiting Aviso Online, there is a link for you to register.

Once registered for Aviso Online, you can log in by entering your email address and password on the Account Login screen.

The URL of the Aviso Online login page is <https://online.aviso.ca/>

aviso Français

Account Login

Email
Enter your email

Password
Enter your password **SHOW**

Remember me [Forgot password?](#)

Login

First visit to Aviso Online? [Register Now](#)
Any questions? [Visit FAQ](#)

Aviso Financial Inc. delivers a highly competitive wealth offering and access to a full suite of investment solutions for our partners' members and clients. We take pride in offering comprehensive, scalable dealer services with exceptional support for both advisors and clients, including practice management support.

Features on the Login page:

- Language preference (stored as a cookie)
- Forgot password
- Login
- Link to register

Self-Registration

Step 1: Click on 'Register Now' to begin the self-registration process. You will need the following information to complete the registration process:

- Email
- First & Last Name
- Date of Birth
- Social Insurance Number
- Account Number
- Advisor Name

The screenshot shows the Aviso Account Login page. At the top left is the Aviso logo, and at the top right is the text "Français". The main content area is titled "Account Login" with a lock icon. Below the title are two input fields: "Email" with the placeholder "Enter your email" and "Password" with the placeholder "Enter your password" and a "SHOW" button. There is a "Remember me" checkbox and a "Forgot password?" link. A blue "Login" button is centered below the fields. At the bottom of the form area, there are two links: "First visit to Aviso Online? Register Now" and "Any questions? Visit FAQ". Below the form area is a paragraph of text: "Aviso Financial Inc. delivers a highly competitive wealth offering and access to a full suite of investment solutions for our partners' members and clients. We take pride in offering comprehensive, scalable dealer services with exceptional support for both advisors and clients, including practice management support."

Step 2: Enter your email address, first and last name. Press "Next"

The screenshot shows the "Self-Registration" page, Step 1 of 3: "Create your Credential Online profile". The title "Self-Registration" is in blue. Below the title is the subtitle "Step 1 of 3: Create your Credential Online profile". There are three input fields: "Email", "First Name", and "Last Name". A blue "Next" button is centered at the bottom of the form.

Step 3: You will be sent a Confirmation Code. Enter in your Confirmation Code and then create a new password following the password requirements. Click 'Next'.

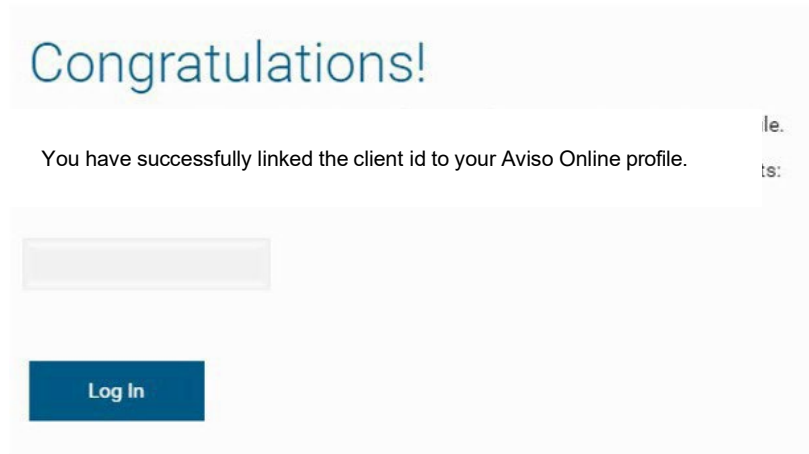
Note: Open a separate tab when retrieving your confirmation code. Navigating away from Aviso Online will cause the self-registration process to restart.

The screenshot shows a web form titled "Self-Registration" with the subtitle "Step 2 of 3: Confirm email and create password". Below the title, there is a message: "A Confirmation Code has been sent to you by email. If you do not receive it within 30 minutes, you can request a new code to be emailed to you." An "Important" note follows: "Please keep this window open while you retrieve your confirmation code." The form contains four input fields: "Email", "Confirmation Code" (with a help icon), "New Password", and "Verify Password". Below the "New Password" field, the "Password requirements" are listed: 8 characters, 1 upper and 1 lowercase letter, and 1 number or symbol. A blue "Next" button is located at the bottom of the form.

Step 4: Enter your account number (with no dashes or spaces), the missing digits of your SIN, your Date of Birth, and your Advisor's first and last name. Click 'Continue'.

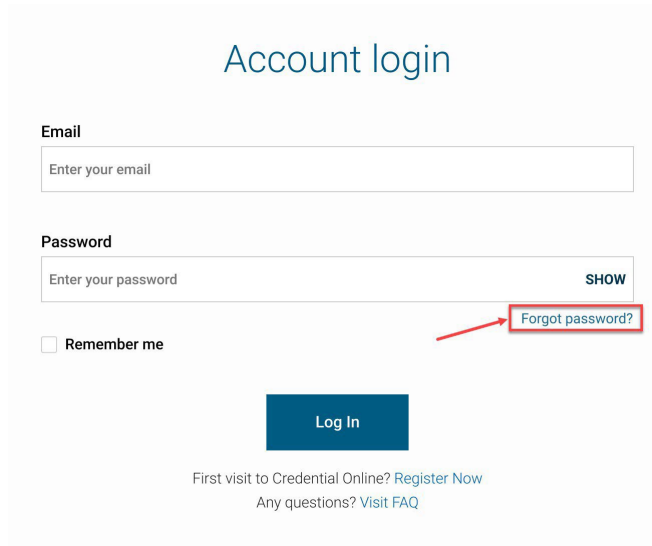
The screenshot shows a web form titled "Self-Registration" with the subtitle "Step 1 of 3: Create your Aviso Online profile". The form is set within a dark blue header with the "aviso" logo and "Français" language selector. The form contains three input fields: "Email", "First Name", and "Last Name". A blue "Next" button is positioned below the "Last Name" field. At the bottom of the page, there is a footer with the text: "Contact | Legal | Privacy © 2024 - Aviso Wealth".

Step 5: You will see a confirmation message that your accounts have been linked to your online profile. Click 'Log in' to return to the login screen and access your accounts.



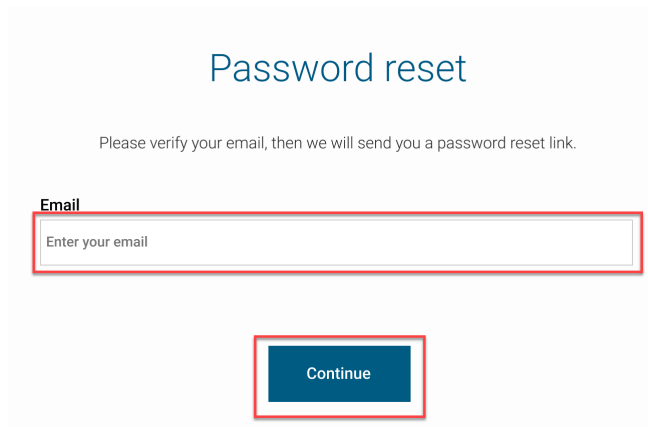
Password Reset

Step 1: Click on the “Forgot” option on the login screen.



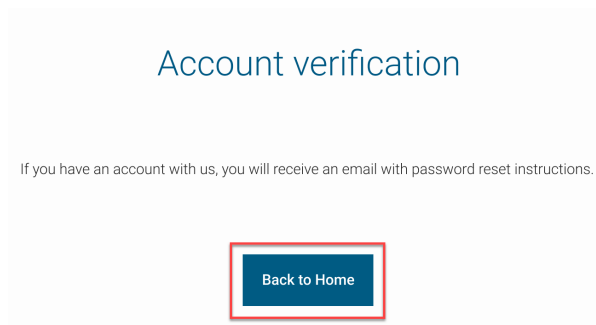
The screenshot shows the 'Account login' page. It features an 'Email' input field with the placeholder 'Enter your email', a 'Password' input field with the placeholder 'Enter your password' and a 'SHOW' toggle, and a 'Remember me' checkbox. A red box highlights the 'Forgot password?' link, with a red arrow pointing to it from the right. Below the input fields is a blue 'Log In' button. At the bottom, there are links for 'Register Now' and 'Visit FAQ'.

Step 2: Enter your email address and press ‘Continue’.



The screenshot shows the 'Password reset' page. It includes the heading 'Password reset' and the instruction 'Please verify your email, then we will send you a password reset link.' Below this is an 'Email' input field with the placeholder 'Enter your email', which is highlighted with a red box. A blue 'Continue' button is also highlighted with a red box.

Step 3: On the Account Verification page, either **close browser** or click, **Back to Home**.



The screenshot shows the 'Account verification' page. It features the heading 'Account verification' and the text 'If you have an account with us, you will receive an email with password reset instructions.' A blue 'Back to Home' button is highlighted with a red box.

Step 4: A Confirmation email from clientcare@Aviso.com will be sent to you. Click the link in the email to complete the password reset process.

Template Name: ForgotPwdWithLink
Sender: Aviso Support service@aviso.ca
Sender: Service à la clientèle Aviso < service@aviso.ca >
Subject: Aviso Online password reset link
Subject: Lien de réinitialisation du mot de passe Aviso en ligne
Dear Investor,
You are receiving this email because you requested to reset a password.
Please click on the following link to complete the process:
<%FORGOT_PWD_LINK_TEXT%>
If you received this in error, you can safely ignore it.
If you require assistance, please contact Aviso Service Centre at 1.855.714.3800.
Aviso www.aviso.ca
1.855.714.3800 service@aviso.ca
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Step 5: If the password being recovered is for a(n):

a. Individual Account

- i. Enter the **partial SIN** of the main account holder on the [Identity Verification](#) page
NOTE: THE SYSTEM WILL RANDOMLY SELECT EITHER THE FIRST 3, MIDDLE 3, OR LAST 3 NUMBERS OF THE SIN TO BE COMPLETED
- ii. Enter the **Date of Birth** of the main account holder on the [Identity Verification](#) page
- iii. Click Continue

Identity verification

Before you can reset your password, please verify your identity by filling in the **3 missing numbers** of your 9-digit social insurance number and your date of birth.
Are you trying to log in to your [corporate account](#) instead?

Social Insurance Number

X	X	X	X	X	X			
---	---	---	---	---	---	--	--	--

Date of Birth

Month ▾	Day ▾	Year ▾
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b. Corporate Account

- i. Enter the company name on the on the Identity Verification page
- ii. Enter the postal code on the Identity Verification page
- iii. Click Continue

Identity verification

Before you can reset your password, please verify your company name and your postal code. Your company name must be an exact match.
 Are you trying to log in to your [individual account](#) instead?

Company Name

Postal Code

Continue

Step 6: Change password by following the onscreen instructions

Password change

Now that you have verified your identity, you can change your password.
 Your new password must meet all of the following requirements:

- At least 8 characters long
- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 number or symbol

New Password

 SHOW

Verify New Password

 SHOW

Continue

Step 7: Once your password reset is complete, you will receive onscreen confirmation. Click on continue to log in to Aviso Online.

Password change success

Your new password was successfully changed.
You can now log in to your account.

[Continue](#)

Summary

On the left side of the Summary screen there is a series of menu items which allow you to navigate through Aviso Online – the first option being ‘Summary’. The Summary screen provides an overview of your accounts.

The screenshot shows the Aviso Online interface. At the top left is the 'aviso' logo and a menu icon. At the top right, there is a user profile 'Test C', a mail icon, a help icon, and the language 'Français'. The main content area is titled 'Summary' and displays 'Total CAD Assets' as **\$148,062.30**. Below this is a table for account 'DAF4DU -CAM' with a total CAD Assets of **\$148,062.30**. The table has columns for Cash, Market Value**, Book Cost, and Total. It lists four rows of assets: RRSP (DAF4DU03), RESP (IND) (DAF4DU04), TFSA (DAF4DU1P), and TFSA (DAF4DU02).

DAF4DU -CAM	Cash	Market Value**	Book Cost	Total
RRSP DAF4DU03	\$7,798.77	\$123,295.22	\$128,165.18	\$131,093.99
RESP (IND) DAF4DU04	\$3,781.00	\$243.98	\$4,062.30	\$4,024.98
TFSA DAF4DU1P	\$3,750.00	\$9,193.33	\$11,781.09	\$12,943.33
TFSA DAF4DU02	\$0.00	\$0.00	\$0.00	\$0.00

* Unrealized
** Price and Market value are updated daily
*** The foreign exchange (FX) rate indicated is the spot rate and is captured once each day. Transactions will include a spread off of the spot rate.
For the Summary and holdings pages, cash and market values are based on trade date.

At the bottom left, it shows 'Last Login: 4 March 2024 11:45:28 AM' and links for 'Legal' and 'Privacy'.

Features on the Summary page:

- List of all your accounts
- Account type, cash balance, market value, gain/loss
- Total consolidated assets, as well as total CAD and total USD assets
- Links to holdings and history

Holdings


The Holdings screen provides a more detailed view of your investments within each account. You can select the account you would like to view in the drop-down menu near the top of the screen.

The screenshot shows the 'Holdings' page in the Aviso client portal. At the top, there's a navigation bar with the 'aviso' logo, a menu icon, and user information for 'Test C' in 'Français'. A sidebar on the left contains navigation links for Summary, Holdings (selected), History, Performance, and eServices. The main content area displays the account name 'RRSP (DAF4DU03)' with a total value of '\$131,093.99'. Below this, it shows 'Cash: \$7,798.77' and 'Market Value: \$123,295.22'. A table of holdings is shown with columns for Security, Symbol, Type, Quantity, Price, Market Value, Cost/Share, Book Cost, Gain/Loss, and Allocation. The table lists one holding: 'MACKENZ CDN GWTH BAL SR PW -FE' with a quantity of 7,632.0160 and a market value of \$123,295.22. A 'Total' row summarizes the holdings. A download icon is visible on the right side of the table. Below the table, there are footnotes regarding unrealized gains, price updates, and a disclaimer.

Security	Symbol	Type	Quantity	Price**	Market Value**	Cost/Share***	Book Cost	Gain/Loss*	Allocation
MACKENZ CDN GWTH BAL SR PW -FE	MFC6154	Mutual Funds	7,632.0160	16.155	\$123,295.22	\$15.77	\$120,366.41	\$2,928.81	100.00%
Total					\$123,295.22		\$120,366.41	\$2,928.81	100 %

* Unrealized
 ** Price and Market value are updated daily.
 *** Please note that Average cost and Cost/Share are the same calculation.
 The information presented is not an official statement of your positions. If there are any discrepancies between the transactions or positions shown on the monthly statements you receive and those shown above, please report them to your Investment Advisor.
 For the Summary and Holdings pages, cash and market values are based on trade date.

Features on the Holdings page:

- Ability to sort the table by clicking on column headers
- View holdings as a table or charts
- Export a .CSV file by clicking on the download icon  on the right-hand side of the screen.


History

The History screen displays transactions at the account level. You can select the account you would like to view in the drop-down menu near the top of the screen.

The screenshot shows the 'History' page for an RRSP account (DAF4DU03). At the top, there is a summary bar with 'Cash: \$7,798.77' and 'Market Value: \$123,295.22'. Below this, a table titled 'Latest Transactions' displays a list of monthly contributions. The table has columns for Trade Date, Settlement Date, Activity, Description, Symbol, Quantity, Price, and Net Amount. All entries are 'Rrsp Cont' with a description of 'RRSP CONTRIBUTION' and a net amount of \$125.00. A download icon is visible in the top right corner of the table area.

Trade Date	Settlement Date	Activity	Description	Symbol	Quantity	Price**	Net Amount
28-Feb-2024	01-Mar-2024	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
13-Feb-2024	15-Feb-2024	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
30-Jan-2024	01-Feb-2024	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
11-Jan-2024	15-Jan-2024	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
28-Dec-2023	02-Jan-2024	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
13-Dec-2023	15-Dec-2023	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
29-Nov-2023	01-Dec-2023	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
10-Nov-2023	15-Nov-2023	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
30-Oct-2023	01-Nov-2023	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
12-Oct-2023	16-Oct-2023	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
28-Sep-2023	03-Oct-2023	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
13-Sep-2023	15-Sep-2023	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
30-Aug-2023	01-Sep-2023	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
11-Aug-2023	15-Aug-2023	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00
28-Jul-2023	01-Aug-2023	Rrsp Cont	RRSP CONTRIBUTION		0	\$0.0000	\$125.00

Features on the History page:

- Sort the table by clicking on column headers
- Export a .CSV file by clicking on the download icon  on the right-hand side of the screen.

Performance

On the Performance screen, you can view the performance of your accounts. You can select the account you would like to view in the drop-down menu near the top of the screen.

The screenshot displays the 'Performance' page for an RRSP (DAF4DU03) as of December 31, 2022. The account balance is \$131,093.99. The current cash is \$7,798.77 and the market value is \$123,295.22. The monthly performance section indicates that no performance data was found for the selected account.

The 'Quarterly Performance' table shows the following data:

Quarter	Period End Total ***	Return
1st Quarter 2022	\$119,864.07	-6.97%
2nd Quarter 2022	\$110,466.07	-8.44%
3rd Quarter 2022	\$112,130.83	0.82%
4th Quarter 2022	\$0.00	40.57%

The 'Prior Years' Performance' table shows the following data:

Year	Period End Total ***	Net Invested	Return
2016	\$11,846.81	\$11,902.73	Not available
2017	\$38,352.07	\$24,371.04	6.22%
2018	\$37,932.13	\$2,400.00	-7.08%

The 'Annualized Account Rate of Return' table shows the following data:

Years	Return
1 Year	-15.55%
3 Years	2.16%
5 Years	2.88%

Features on the Performance page:

- Monthly, quarterly, annually, and prior years' performance tables

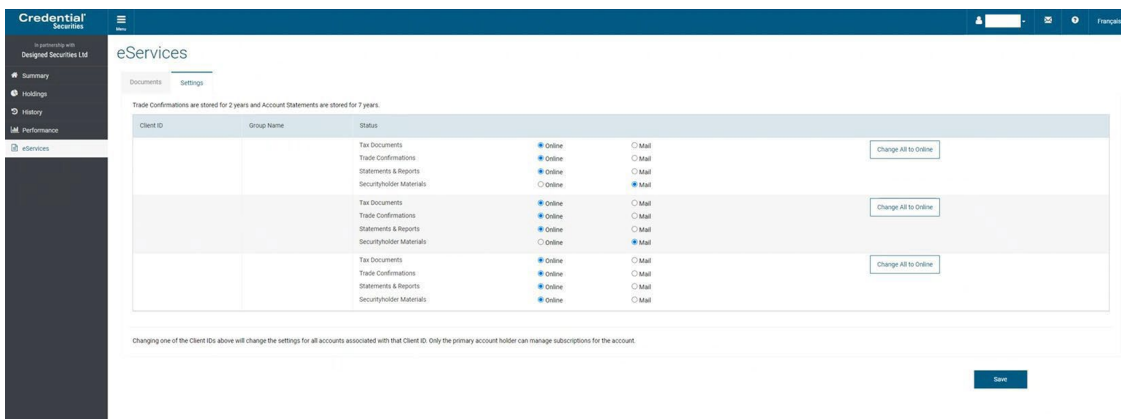
eServices

Documents

In the Documents tab, you can view and download your electronic documents such as account statements and tax slips.

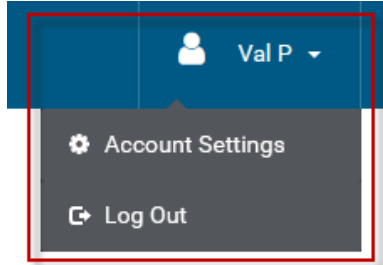
Settings

Through the Settings tab, you can update your document delivery preference.



Account settings

Through the drop-down menu near the top of the screen, you can select Account Settings to customize your Aviso Online experience.



My Profile

The My Profile tab within Settings enables you to update your email address and change your password.

A screenshot of the 'Settings' page in the Aviso Online interface. The 'My Profile' tab is selected. The page shows the following information and fields:

- Name:** Amritpal Manak
- Email:** amanak@aviso.ca. A 'Change' button is next to it. Below the email is the text: 'Changes of this email will apply to your login and account notifications.'
- Address:** TEST1 2A5766, 7524 100 AVE, FORT ST JOHN, BC V1J1V9, (111)111-1111. Below the address is the text: 'To update your address or phone number, contact your advisor.'
- Login Password:** Three input fields for 'Current Password', 'New Password', and 'Confirm New Password'. A 'Save' button is next to the 'Confirm New Password' field.

The left sidebar contains navigation links: Summary, Holdings, History, Performance, and eServices. The top navigation bar includes the Aviso logo, a menu icon, the user name 'Amritpal M', and icons for email, help, and language (Français). The bottom left corner shows 'Last Login 27 March 2024 2:01:24 PM' and links for 'Legal' and 'Privacy'. A circular 'back to top' button is in the bottom right corner.

Preferences

The Preferences tab allows you to choose your default account and customize your account group name(s) and session timeout.

Settings

My Profile | **Preferences** | New Account

Default Account: Select

Group Names: [Text Input] [Text Input]

Session Timeout: 20 min

Save

Add New Accounts

From the New Account tab, you can add subsequent Aviso accounts to your Aviso Online profile.

Add New Accounts

My Profile | Preferences | **New Account**

The information provided will be used to verify your identity and activate the account.

Account Number [Text Input] ?
e.g. 2A1234A1

Social Insurance Number [X][X][X][][][][X][X][X] ?

Date of Birth Month [Dropdown] Day [Dropdown] Year [Dropdown]

Advisor First and Last Name [Text Input] ?
e.g. "John Smith" or "Jonathan Smith"

corporate account

Continue

Questions

If you have any questions about Aviso Online, contact the Service Centre.

Phone: 1.855.714.3800

Email: service@Aviso.com