

New Credential Online platform Quick Reference Guide for setting up your profile

For Credential Asset Management clients

January 2021

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Overview

As of January 18, 2021, Credential Asset Management clients will have access to a **new online account portal called Credential Online** that allows you to view information about your mutual fund account(s).

This document highlights the process you are required to follow to set up your profile in Credential Online.

Note: This guide is intended for clients who had an existing Credential Asset Management online profile before January 18, 2021. If you did not have an existing online profile before January 18, 2021, please contact the Service Centre at 1.855.714.3800 or service@credential.com for assistance.

Step 1: Log into your profile

- Go to: online.credential.com.
- The screen below introduces Credential Online and the steps to access the new platform.
- Input your Client ID and password. You can find your Client ID on your last statement before January 18, 2021.

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Re-register for access to the new online platform

! Re-register

As of January 18, 2021, Credential Asset Management clients have access to a new online account portal. Please re-register to view your account(s).

Client ID:

Password:

Re-register [Forgot Client ID or Password?](#)

? See the [step-by-step](#) guide for re-registration.

Login

If you have registered, log in here.

Login

Note: After seven failed password attempts, you will be locked out. If this occurs, call the Service Centre at 1.855.714.3800 for assistance.

Step 2: Get started

- Review the steps needed to create your new Credential Online profile then click 'Continue' to proceed.

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Français

Get Started

There are a few steps you will need to complete in order to set up your access to Credential Online. It should only take about 10 minutes.

- ① Create your username
- ② Create your password
- ③ Verify your email address
- ④ Confirm accounts
- ⑤ Accept the online agreement
- ⑥ Sign up for eServices

Continue

Need Help?

Contact us at 1.855.714.3800 or service@credential.com,
Monday to Friday 5:30am to 5pm PT (8:30am to 8pm ET)

Step 3: Create username

- Enter your email address you would like to use to log into Credential Online going forward.
- Type the same email address in both fields and presses 'Continue'.

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The screenshot shows a web form titled 'Create your username'. At the top, there is a progress bar with five steps: 'Login Details', 'Email Verification', 'Accounts', 'Agreement', and 'eServices'. The 'Email Verification' step is currently active, indicated by a blue circle. Below the progress bar, the heading 'Create your username' is displayed in a large, bold, blue font. Underneath, a message states: 'Your email address will be your username in Credential Online. Please enter your email address below.' There are two input fields: the first is labeled 'Email Address' and the second is labeled 'Confirm Email Address'. Both fields are empty. At the bottom of the form, there is a blue button labeled 'Continue'.

Need Help?

Contact us at 1.855.714.3800 or service@credential.com,
Monday to Friday 5:30am to 5pm PT (8:30am to 8pm ET)

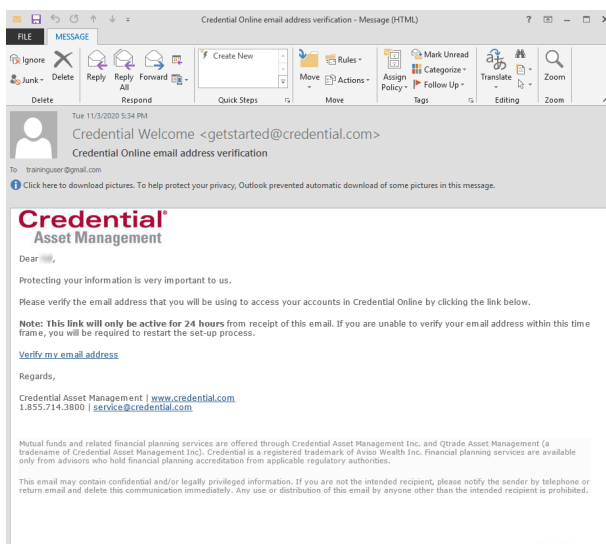
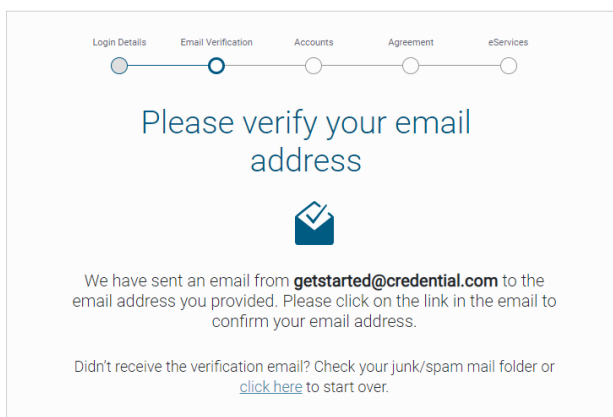
Step 4: Create password (for login to Credential Online)

- Create your password for Credential Online. It must meet the following criteria:
 - Minimum 8 characters in length
 - 1 character must be an uppercase letter
 - 1 character must be a lowercase letter
 - 1 character must be a number or symbol (for example: 1234567890 OR !@#\$\$%^&*)
- Fill out both fields with the same password and presses 'Continue'.

The screenshot shows the 'Create your password' screen within the Credential Asset Management system. At the top, a dark blue header contains the 'Credential Asset Management' logo. Below the header, a progress bar indicates the current step is 'Login Details', with other steps being 'Email Verification', 'Accounts', 'Agreement', and 'eServices'. The main heading 'Create your password' is centered. Below it, there are two input fields: 'Enter Password' and 'Verify Password', both containing masked text (dots). Between these fields, a list of password requirements is shown with checkmarks: 'At least 8 characters long', '1 uppercase letter', '1 lowercase letter', and '1 number or symbol'. A blue 'Continue' button is located at the bottom right of the form area.

Step 5: Email address verification

- A verification email is sent to the email address you provided.
- Check your inbox for an email from **Credential Welcome** (getstarted@credential.com).
- Click on 'Verify my email address' to proceed to the next step.



Note:

- If you did not receive your email after a few minutes, check your Junk/Spam mail folder.
- If you believe the email may not have been received or you would like to start over with a different email address, return to **Step 1** of this guide.

Step 6: Log in with username and password to complete set up

- The email address entered in the previous screen will now automatically appear in the username field.
- Type your **new** Credential Online password created in **Step 4** and press 'Continue'.

Note: After pressing 'Continue', your old WebCONNECT login details will no longer be valid.

The screenshot shows the 'Credential Asset Management' interface. At the top, there is a dark blue header with the logo on the left and a 'Français' link on the right. Below the header is a progress bar with five steps: 'Login Details', 'Email Verification', 'Accounts', 'Agreement', and 'eServices'. The 'Email Verification' step is currently active, indicated by a blue circle. The main content area has a light gray background and contains the following text: 'Your email address has been verified! Just a few more steps.' followed by 'Please enter the username and password you just created. After you successfully log in, your old login details will no longer be valid.' Below this text are two input fields: the first is pre-filled with 'traininguser@gmail.com' and the second is labeled 'Password'. A blue 'Continue' button is positioned below the password field. At the bottom of the screen, there is a 'Need Help?' section with contact information: 'Contact us at 1.855.714.3800 or service@credential.com, Monday to Friday 8:30am to 5pm PT (8:30am to 8pm ET)'.

Step 7: Review accounts

- This screen will provide a list of all the accounts you can access with your new Credential Online profile.
- Review the accounts listed and press 'Continue' to proceed.

Credential
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Login Details

Email Verification

Accounts

Agreement

eServices

Accounts available through
your Credential Online profile

All of the account(s) listed below are accessible to you
through a single login, using the username and password
you created for Credential Online.

Accounts

Individual

RRSP
TFSA
LIF
Spousal RRSP

Continue

Note: This page will list accounts associated with your old Credential Asset Management profile.

Step 8: Accept the Credential Online agreement

- Review and accept (or decline) the Credential Online agreement.

The screenshot shows the 'Credential Online agreement' screen. At the top, there is a blue header with the 'Credential' logo and 'Asset Management' text on the left, and 'Français' on the right. Below the header is a progress bar with five steps: 'Login Details', 'Email Verification', 'Accounts', 'Agreement' (which is highlighted with a blue circle), and 'eServices'. The main heading is 'Credential Online agreement'. Below it, a message states: 'In order to use the new platform, please review and accept the Credential Online Agreement.' A scrollable box contains the 'Client Internet Access Agreement' text. At the bottom of the scrollable box, there are two buttons: 'I do not agree' and 'I agree'.

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Login Details Email Verification Accounts **Agreement** eServices

Credential Online agreement

In order to use the new platform, please review and accept the Credential Online Agreement.

Client Internet Access Agreement

The accessor ("Client"), in consideration of Credential Securities Inc. (the "Agent") providing the Client with access via the Internet to such information as the Agent may make available in respect of any Account of the Client (the "Internet Account Enquiry Access"), agrees with the Agent, on its own behalf and as trustee for the directors, officers, employees and agents of the Agent on its own behalf and as trustee for the directors, officers, employees as follows:

1. AUTHORITY

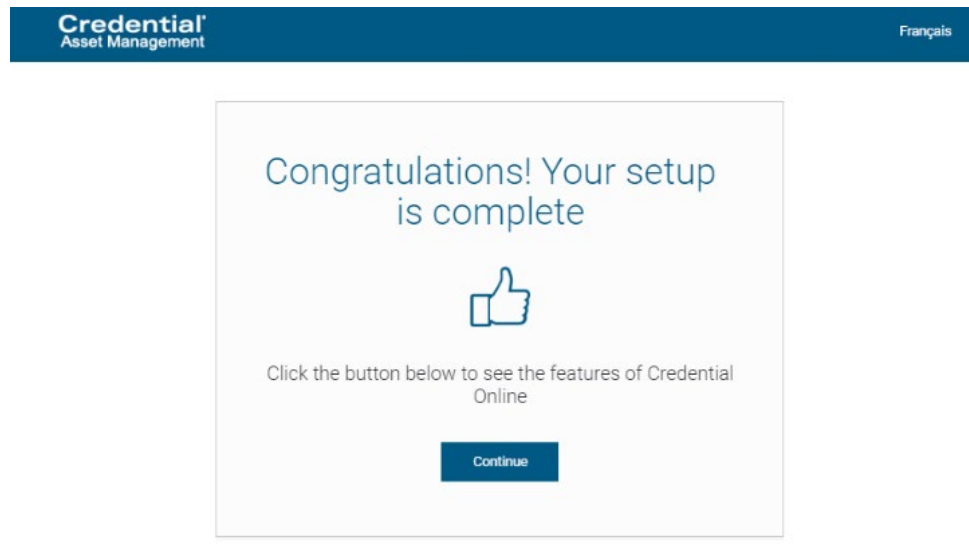
The Client hereby authorizes the Agent to process any instructions to either the Agent entered via the Internet as if the Client had given those instructions in

I do not agree **I agree**

Note: If you select "I do not agree", you will not be able to continue.

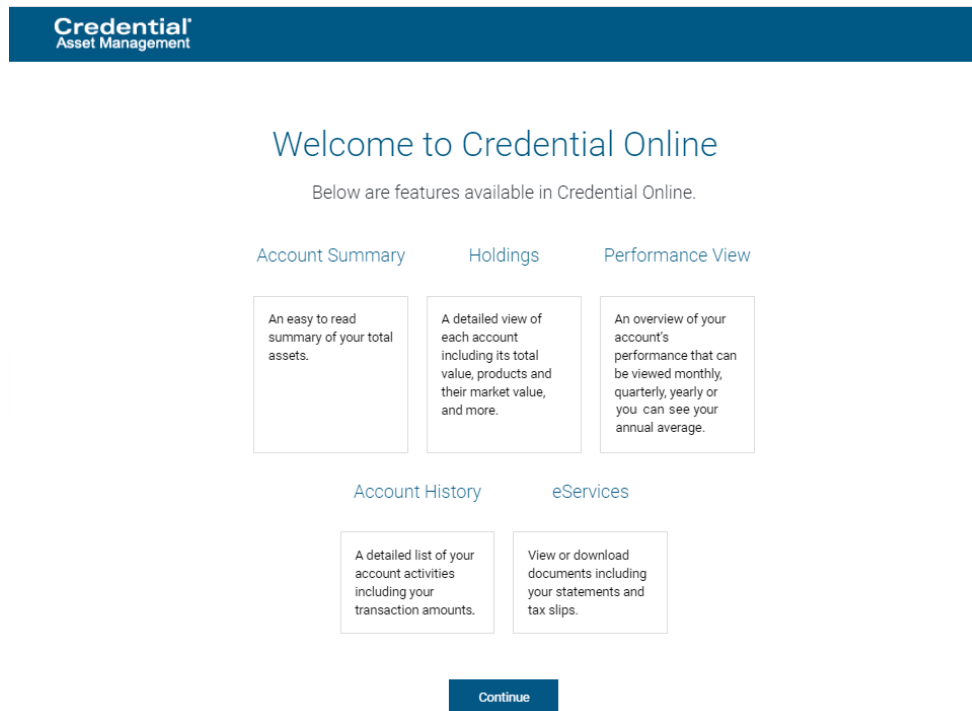
Step 9: Setup complete

- Your setup is now complete.
- Click 'Continue' to view the features of Credential Online.



Step 10: Review Credential Online features

- Review features of Credential Online, then click 'Continue' to proceed.



Step 11: Sign up for eServices

- If you haven't already signed up for eServices, you will be asked if you would like to sign up.
 - If you choose 'Yes, set me up', you will be automatically set up to receive all your account statements and other documents (like tax slips) online.
 - If you choose 'No thanks', you will receive your account statements and tax documents in paper format. (Note: Even though you have chosen a paper format, you will still have access to view and download your account statements and tax documents online).

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Sign up for eServices



By signing up for eServices, all of your statements and documents will be available online. Meaning you'll get them faster and save paper!

Yes, set me up

No thanks

Step 12: View the new online platform

- You have now successfully completed all steps to set up access for your new Credential Online profile.
- You may use the options in the left navigation menu to view details of your accounts.

Credential Asset Management						
Menu						
Summary						
<div> <div>Summary</div> <div>Holdings</div> <div>History</div> <div>Performance</div> <div>eServices</div> </div>						
<div> <div>Total CAD Assets</div> <div> <div>\$550,314.00</div> <div>Gain/Loss*</div> <div>\$21,073.43</div> </div> </div>						
<div> <div>D Training - Individual</div> <div>CAD Assets :</div> <div>\$62,470.86</div> </div>						
	Cash	Market Value**	Book Cost	Gain/Loss*	Gain/Loss%*	Total
TFSA	\$0.00	\$12,441.72	\$11,784.53	\$657.19	5.58%	\$12,441.72
SPLRIF	\$0.00	\$22,727.88	\$22,486.98	\$240.90	1.07%	\$22,727.88
SPLRIF	\$0.00	\$27,301.26	\$27,084.92	\$216.34	0.80%	\$27,301.26
SPSL	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00
RRESP	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00

Questions

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

Phone: 1.855.714.3800

Email: service@credential.com

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