

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

For Credential Asset Management clients

January 2021

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## Overview

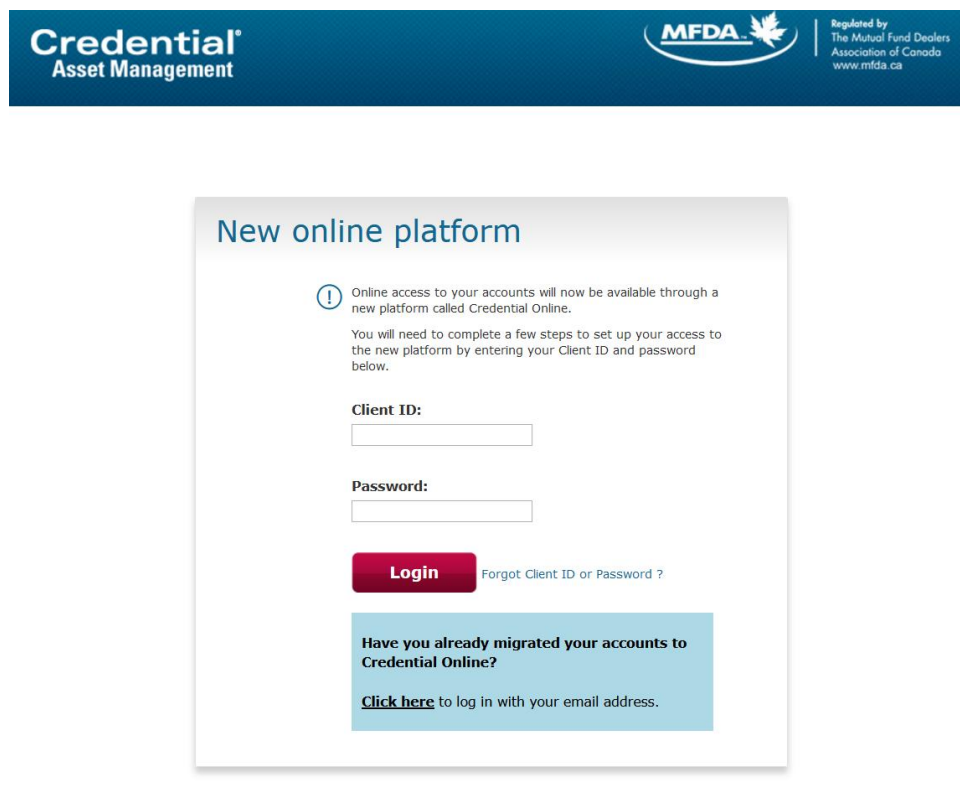
As of January 18, 2021, Credential Asset Management clients will have access to a **new online account portal called Credential Online** that allows you to view information about your mutual fund account(s).

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 have an existing Credential Asset Management profile. If you do not have an existing profile, please contact the Service Centre at 1.855.714.3800 or [service@credential.com](mailto:service@credential.com) for assistance.

### Step 1: Log into your profile

- Go to: [online.credential.com](https://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.



**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.

### 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](mailto: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 interface for creating a username. At the top, there is a progress bar with five steps: 'Login Details', 'Email Verification', 'Accounts', 'Agreement', and 'eServices'. The 'Login Details' step is currently active, indicated by a blue circle. Below the progress bar, the heading 'Create your username' is displayed in a large, 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'. A blue 'Continue' button is positioned at the bottom center of the form area.

#### Need Help?

Contact us at 1.855.714.3800 or [service@credential.com](mailto: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'.

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Login Details | Email Verification | Accounts | Agreement | eServices

### Create your password

**Enter Password**

.....

Password requirements

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

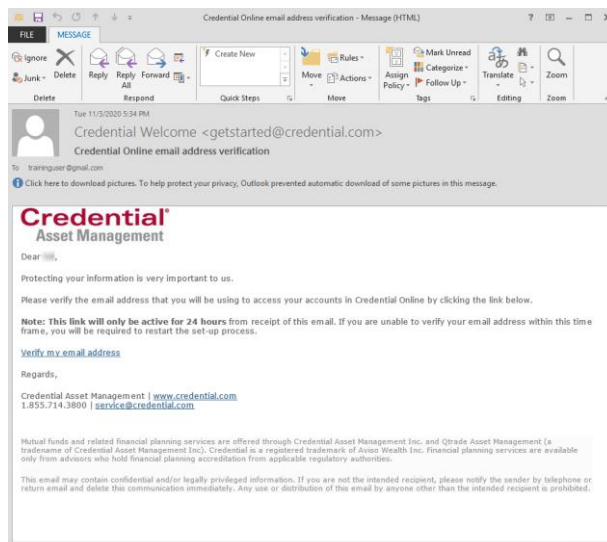
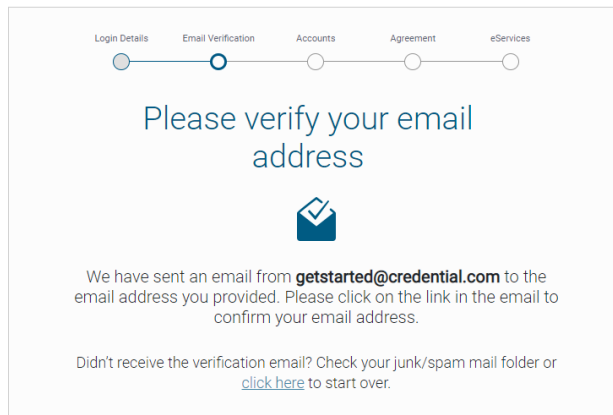
**Verify Password**

.....

**Continue**

## 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](mailto:getstarted@credential.com)).
- Click on 'Verify my email address' to proceed to the next step.



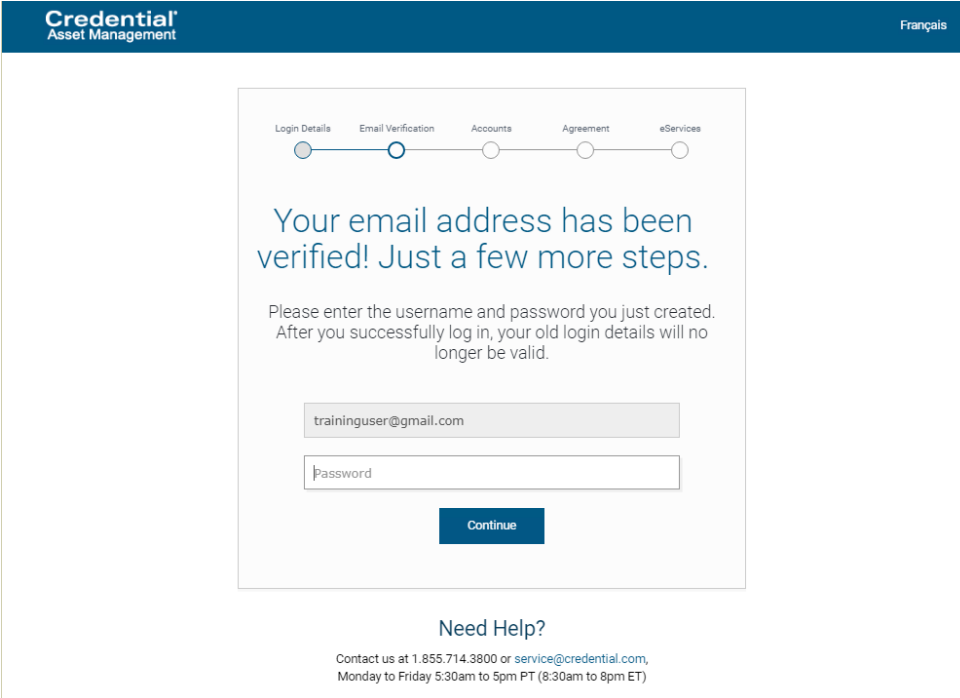
**Note:**

- 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.

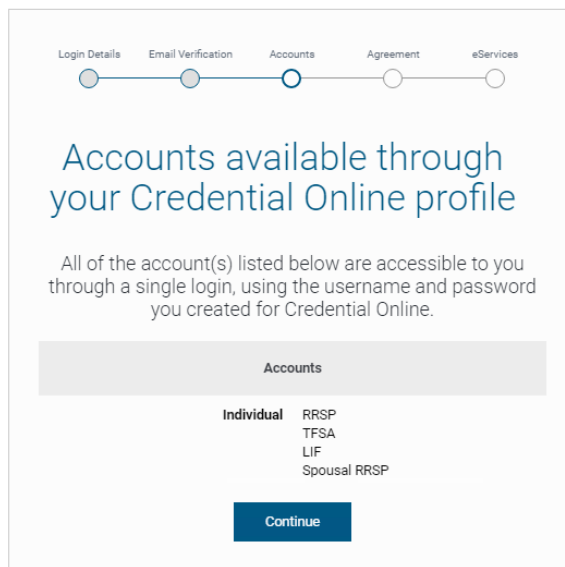


The screenshot shows the Credential Asset Management interface. At the top, there is a dark blue header with the logo "Credential Asset Management" on the left and a "Français" link on the right. Below the header is a progress indicator with five steps: "Login Details", "Email Verification", "Accounts", "Agreement", and "eServices". The "Email Verification" step is currently active, indicated by a blue circle. The main content area 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 contains the email address "traininguser@gmail.com" and the second is labeled "Password". A blue "Continue" button is positioned below the password field. At the bottom of the page, there is a "Need Help?" section with contact information: "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 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.



**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.

Credential Asset Management Français

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

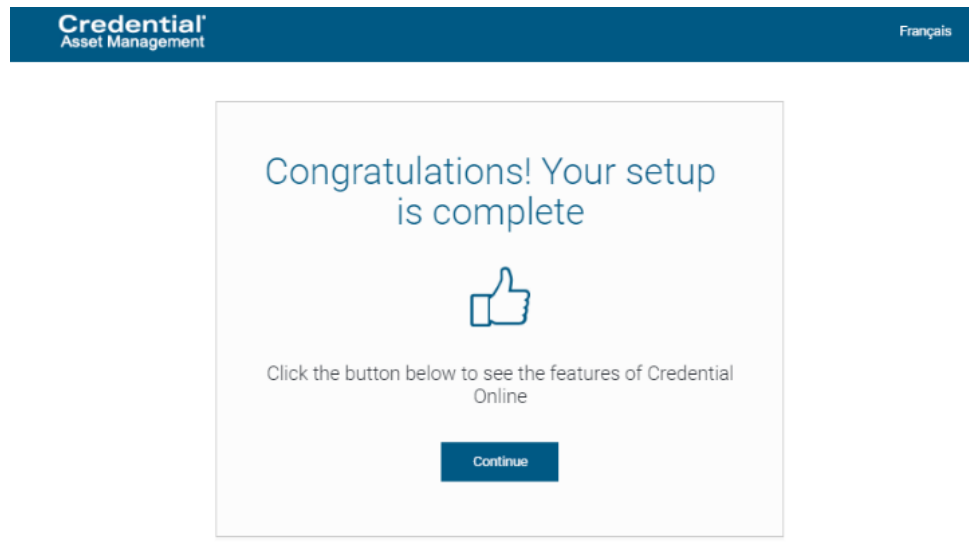
The Client hereby authorizes the Agent to process any instructions to either the Agent entered via the Internet as if the Client had given those instructions in

I do not agree  

**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.

The screenshot shows the Credential Online interface. At the top is a dark blue header with the 'Credential Asset Management' logo. Below the header is the title 'Welcome to Credential Online' and a subtitle 'Below are features available in Credential Online.' There are five feature cards arranged in two rows. The first row contains 'Account Summary', 'Holdings', and 'Performance View'. The second row contains 'Account History' and 'eServices'. At the bottom center is a dark blue 'Continue' button.

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### Welcome to Credential Online

Below are features available in Credential Online.

[Account Summary](#)   [Holdings](#)   [Performance View](#)

An easy to read summary of your total assets.

A detailed view of each account including its total value, products and their market value, and more.

An overview of your account's performance that can be viewed monthly, quarterly, yearly or you can see your annual average.

[Account History](#)   [eServices](#)

A detailed list of your account activities including your transaction amounts.

View or download documents including your statements and tax slips.

[Continue](#)

## 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.

The screenshot shows the Credential Asset Management interface. At the top, there is a navigation bar with the logo, a menu icon, and user information. The main content area is titled 'Summary' and displays 'Total CAD Assets' as \$550,314.00 with a red minus sign, and 'Gain/Loss' as \$21,073.43 with a green plus sign. Below this, a table titled 'CAD Assets' for 'D Training - Individual' shows a total of \$62,470.86. The table has columns for Cash, Market Value\*\*, Book Cost, Gain/Loss\*, Gain/Loss%\*, and Total. It lists five asset types: TFSA, SPLRIF (two entries), SPSL, and RRSP.

| CAD Assets :            |        |                |             |            |             |             |
|-------------------------|--------|----------------|-------------|------------|-------------|-------------|
| D Training - Individual |        | \$62,470.86    |             |            |             |             |
|                         | 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      |
| RRSP                    | \$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](mailto:service@credential.com)

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