

Setting up delegate access in Advisor Portal

With Advisor Portal secure, you have the flexibility to control the information you and any delegates will see. This can be done by changing your settings within your Advisor Portal Profile.

Before you begin

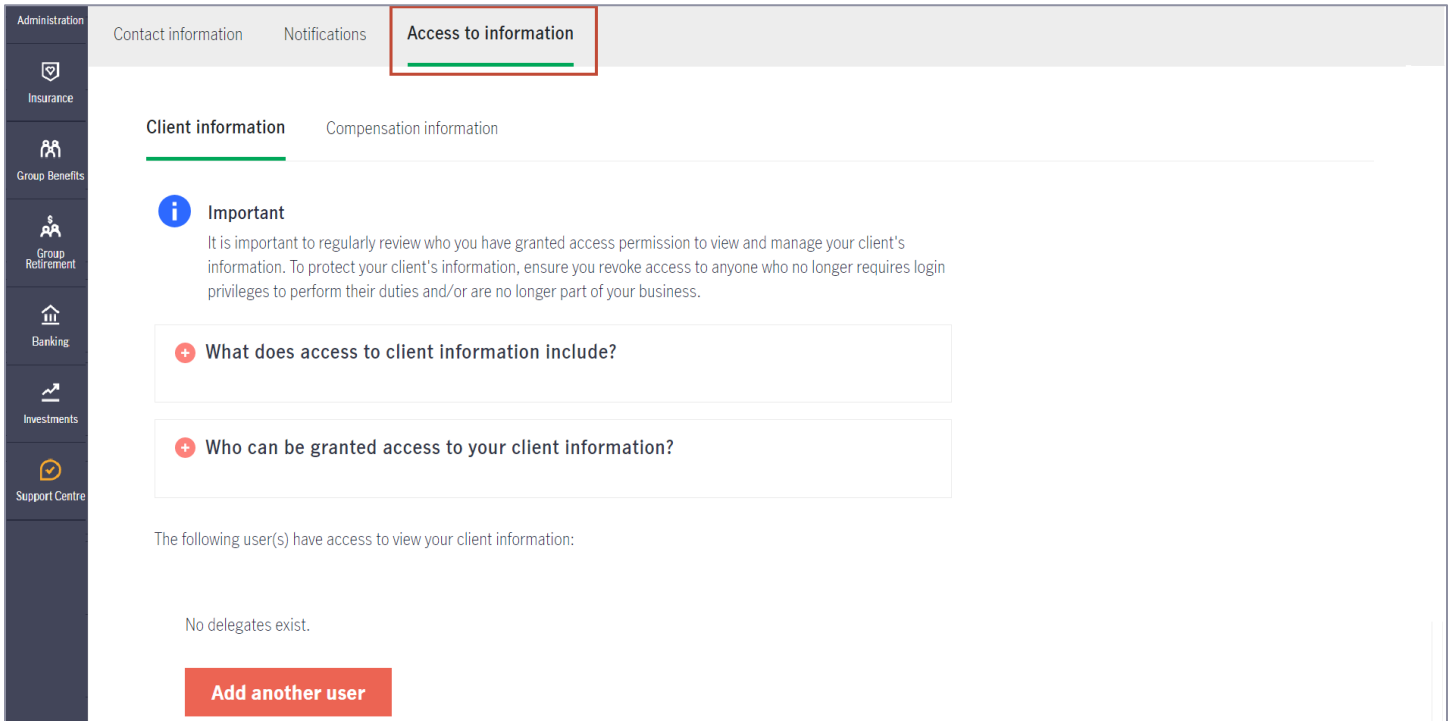
Only users with an active Advisor Portal profile can be granted access. Ensure the person you are granting access to has successfully registered for Advisor Portal before proceeding.

Step 1: From the top utility bar, select **Profile**, then **Preferences** from the options displayed.



The screenshot shows the top utility bar of the Advisor Portal. The navigation tabs are 'Personal', 'Business', and 'Advisors'. The 'Advisors' tab is active. The utility bar includes a search icon, 'Contact us', 'Alerts', 'Secure Inbox', and 'Profile'. The 'Profile' button is highlighted with a red box. A dropdown menu is open under 'Profile', showing options: 'Advisor Manulife ID', 'Preferences' (highlighted with a red box), 'Wealth advisor site', and 'Investments advisor site'. The 'FR' language selector is also visible.

Step 2: Select the **Access to information** tab.



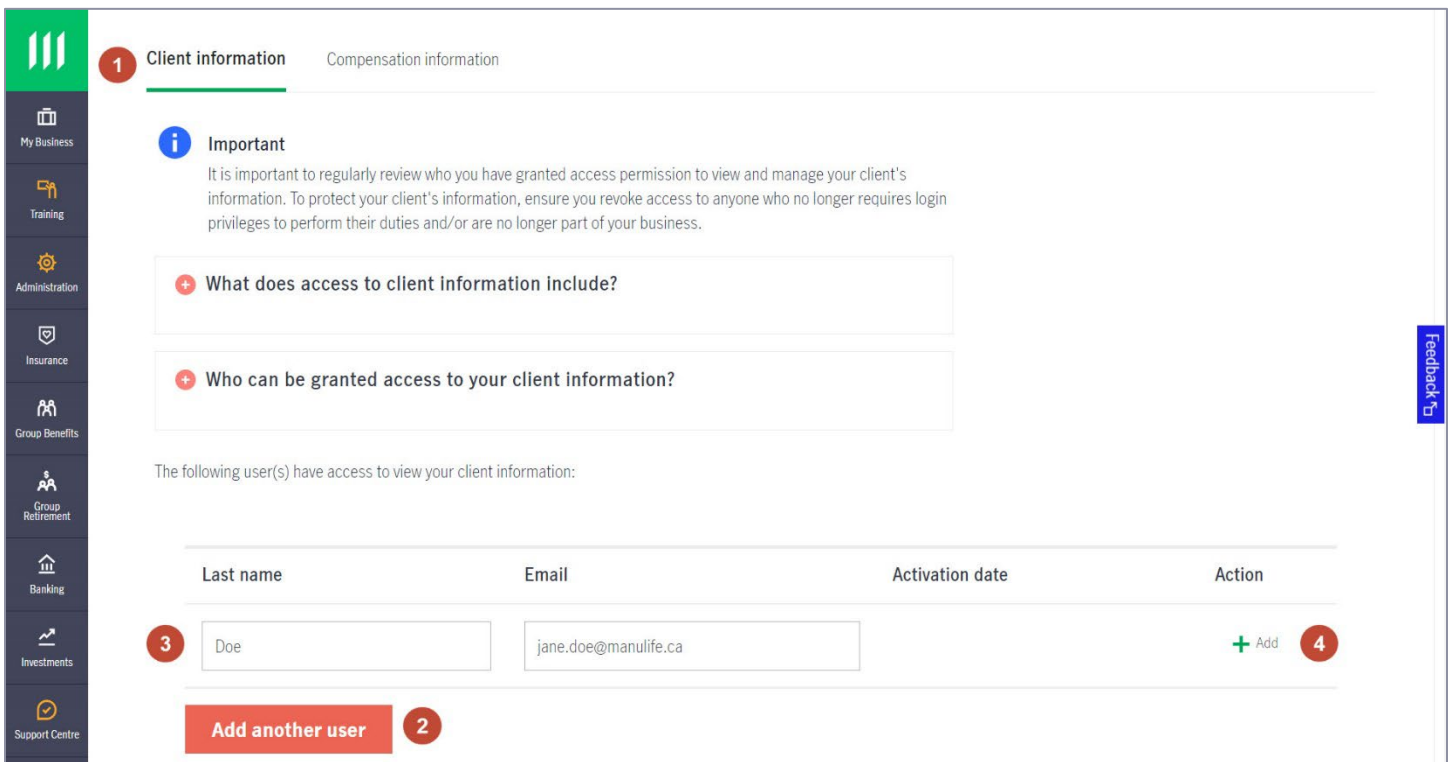
The screenshot shows the 'Access to information' tab selected in the Advisor Portal. The 'Access to information' tab is highlighted with a red box. Below it, the 'Client information' section is active, showing an 'Important' message and two expandable sections: 'What does access to client information include?' and 'Who can be granted access to your client information?'. A list of users with access is shown below, indicating 'No delegates exist'. A red button labeled 'Add another user' is visible at the bottom.

Client information

Access to client information means user(s) will be able to view and manage details such as client inquiries, statements, and notifications.

To grant access to Client information:

- Step 1:** Select the **Client information** tab.
- Step 2:** Select the **Add another user** button.
- Step 3:** Enter the user(s) **Last name** and **Email address** that is linked to their Advisor Portal profile.
- Step 4:** Select the **Add** button.



1 Client information Compensation information

i **Important**
It is important to regularly review who you have granted access permission to view and manage your client's information. To protect your client's information, ensure you revoke access to anyone who no longer requires login privileges to perform their duties and/or are no longer part of your business.

+ What does access to client information include?

+ Who can be granted access to your client information?

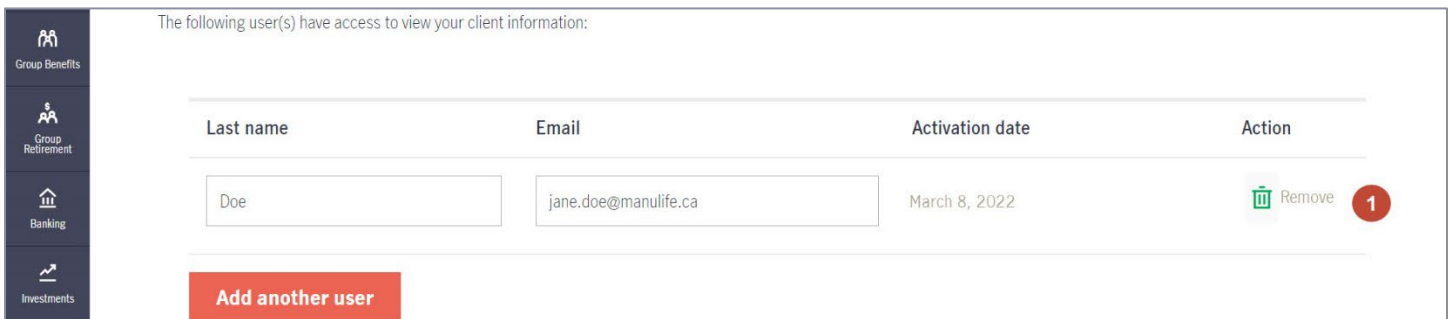
The following user(s) have access to view your client information:

Last name	Email	Activation date	Action
3 Doe	jane.doe@manulife.ca		+ Add 4


Add another user **2**

To remove access to Client information:

- Step 1:** Select the **Remove** button and the user(s) profile will be removed from your preferences.



The following user(s) have access to view your client information:

Last name	Email	Activation date	Action
Doe	jane.doe@manulife.ca	March 8, 2022	 Remove 1

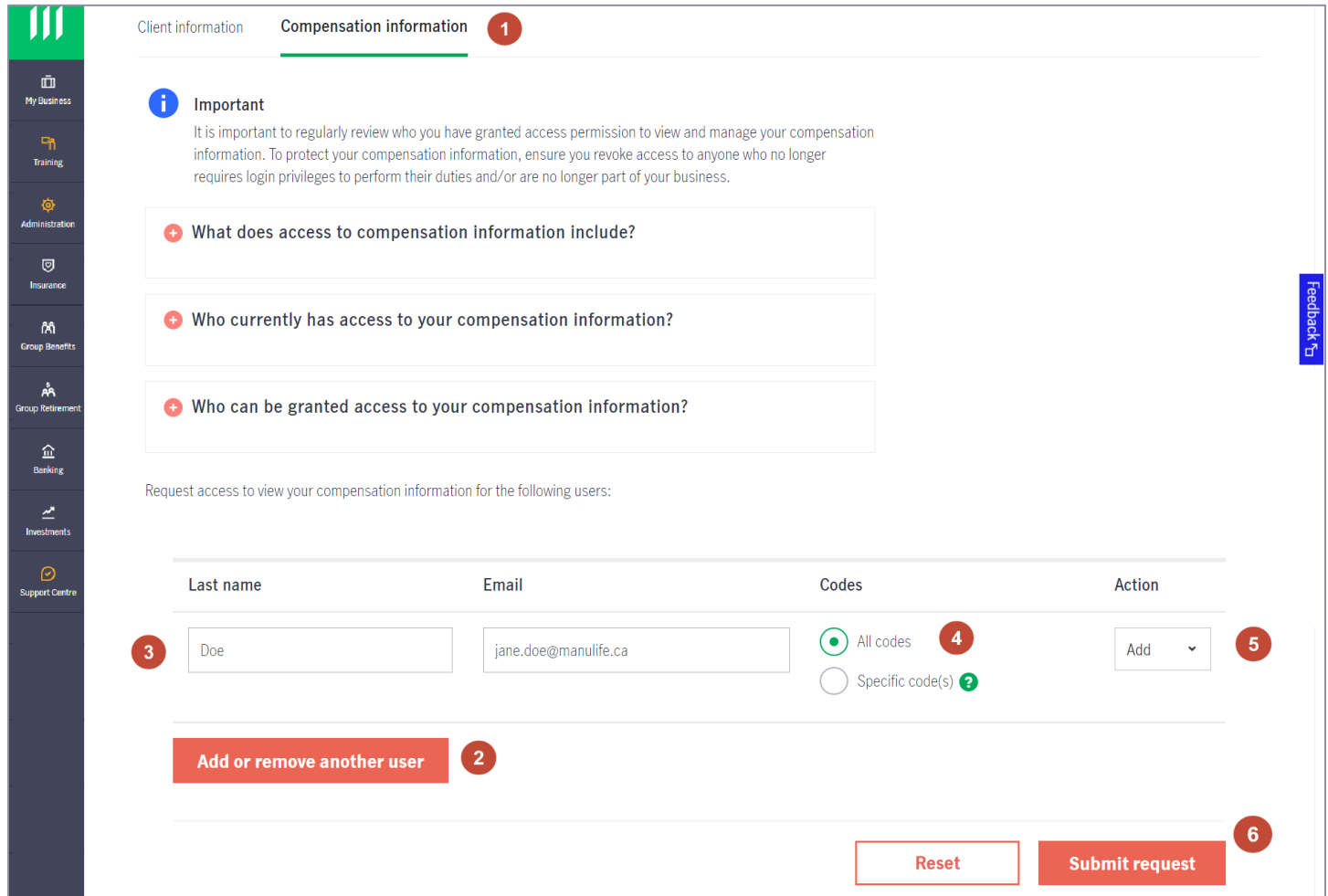
Add another user

Compensation information

Access to compensation information means user(s) will be able to view compensation statements and have access to Fasat.

To grant access to Compensation information:

- Step 1:** Select the **Compensation information** tab.
- Step 2:** Select the **Add or remove another user** button.
- Step 3:** Enter the user(s) **Last name** and **Email address** that is linked to their Advisor Portal profile.
- Step 4:** Select if they will have access to **All codes** or **Specific code(s)**. When entering Specific codes, please separate specific code(s) with the correct formatting, e.g., Code 1, Code 2, Code 3.
- Step 5:** Select **Add** from the **Action** drop-down menu.
- Step 6:** Select the **Submit Request** button.

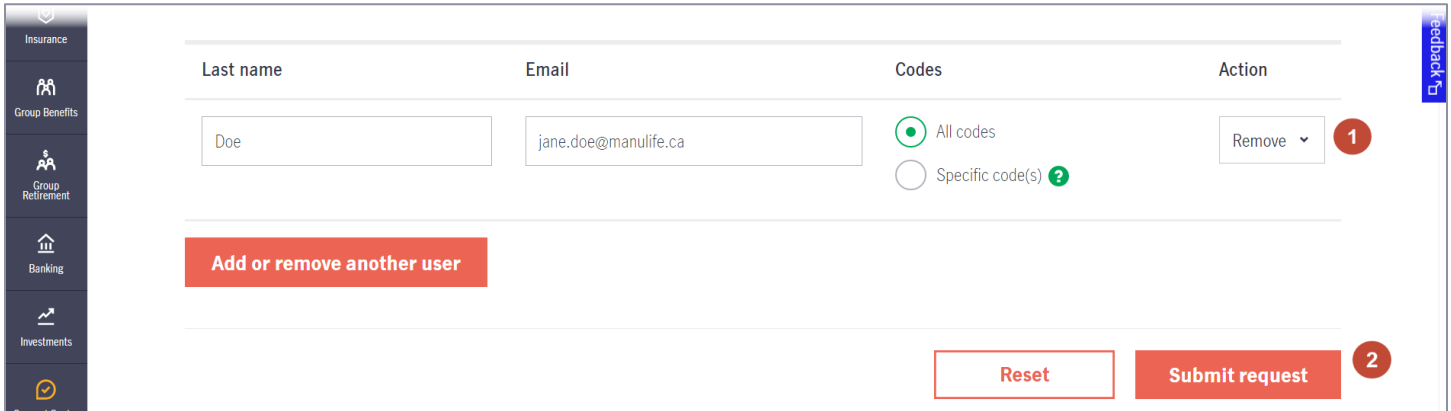


The screenshot shows the 'Compensation information' tab selected in the top navigation bar (1). Below the navigation bar is a sidebar with various service categories. The main content area features an 'Important' notice about regularly reviewing access permissions. Below the notice are three expandable sections: 'What does access to compensation information include?', 'Who currently has access to your compensation information?', and 'Who can be granted access to your compensation information?'. A section titled 'Request access to view your compensation information for the following users:' contains a table with columns for 'Last name', 'Email', 'Codes', and 'Action'. The table has one row with 'Doe' in the last name field, 'jane.doe@manulife.ca' in the email field, and radio buttons for 'All codes' (4) and 'Specific code(s)' (5). The 'Action' column has a dropdown menu with 'Add' selected (5). Below the table is a red button labeled 'Add or remove another user' (2). At the bottom right, there are two red buttons: 'Reset' and 'Submit request' (6). A vertical 'Feedback' button is located on the right edge of the interface.

To remove access to Compensation information:

Step 1: Select **Remove** from the **Action** drop-down menu.

Step 2: Select the **Submit Request** button.



Last name	Email	Codes	Action
Doe	jane.doe@manulife.ca	<input checked="" type="radio"/> All codes <input type="radio"/> Specific code(s) ?	Remove 1

Add or remove another user

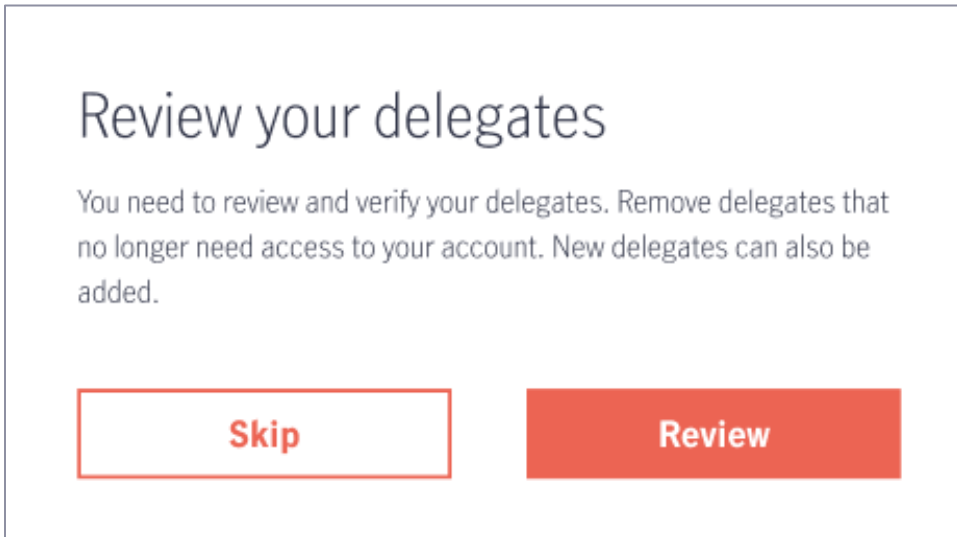
Reset **Submit request** 2

Annual audit

On an annual basis you are asked to ensure your delegates are accurate. Manulife has established a scheduled date for your review on an individual basis, and a pop-up message will appear after logging into Advisor Portal.

Step 1: Select **Review**. This will take you to Preferences within your profile. You will **only** receive this prompt if you have existing delegates under your profile.

Note: You can select **Skip**; however, you can only do this once.



Review your delegates

You need to review and verify your delegates. Remove delegates that no longer need access to your account. New delegates can also be added.

Skip **Review**

Step 2: Follow the steps to add or remove delegates. If no changes are needed, no further action is required, and you can navigate away from the page to exit the preferences screen.