



## Funds Direct “My Portfolio” Online Account Access

Riplinger Financial and our dealer, Funds Direct Canada Inc., are excited to introduce our new “My Portfolio” online account system.

Signing up for online account access is a simple 2-step process:

### Step 1:

Begin the registration process at <https://advisor.fundsdirect.ca/myportfolio/>. Once there, click on “Register Now”.

The prompt will ask for your name, date of birth, phone number, email address and the last three digits of your SIN. These credentials must match what we have on file for you.

Please note, the prompt will also ask for a Log In ID/User ID, which you create. The Log In ID/User ID can be whatever you like, just be sure to remember it as you will need it to sign into your account once it has been set up.

**My Portfolio**

Welcome / Bienvenue

User ID / ID utilisateur: leskarma

Password / Mot de passe:

Forgot Password / Mot de passe oublié

To become a member please [Register Now](#)  
Pour devenir membre s'il vous plait vous [Enregistrer Maintenant](#)

**My Portfolio Registration Request**

Email Address

Confirm Email Address

**LogIn ID**

First Name

Last/Corp Name

Date of Birth  (mm/dd/yyyy)

Phone Number

SIN Last 3 digits

**My Portfolio** lets you have access to:

- ✓ Your investment accounts and transactions
- ✓ Your statements
- ✓ Instant communication from/to your advisor

**LogIn ID/User ID:**  
You create this when registering for the first time and needs to be remembered for future logins. This can be whatever you like.

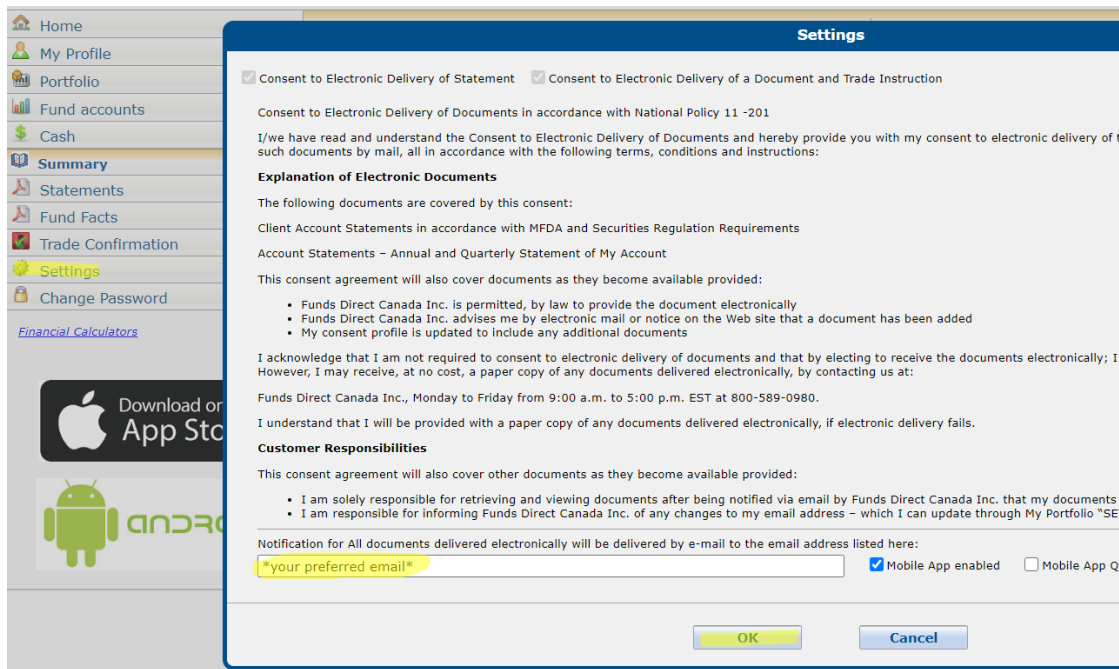
**Phone # Format:**  
306-555-4567

## Step 2:

After you have completed step 1, you will receive an email from Funds Direct confirming your enrolment. The email will provide instructions on how to finish the set-up process, including choosing a password.

## Final Step (Paperless Statements):

Select “Settings” tab (bottom/left menu). Review content, confirm your email address, and click “OK”.



The screenshot shows the 'Settings' screen in the Funds Direct mobile app. The left sidebar menu includes: Home, My Profile, Portfolio, Fund accounts, Cash, Summary, Statements, Fund Facts, Trade Confirmation, Settings (highlighted), Change Password, and Financial Calculators. Below the menu are buttons for downloading the app on the App Store and Google Play. The main content area is titled 'Settings' and contains the following sections:

- Consent checkboxes:  Consent to Electronic Delivery of Statement and  Consent to Electronic Delivery of a Document and Trade Instruction.
- Text: 'Consent to Electronic Delivery of Documents in accordance with National Policy 11 -201' and 'I/we have read and understand the Consent to Electronic Delivery of Documents and hereby provide you with my consent to electronic delivery of such documents by mail, all in accordance with the following terms, conditions and instructions:'.
- Explanation of Electronic Documents**
  - The following documents are covered by this consent:
    - Client Account Statements in accordance with MFDA and Securities Regulation Requirements
    - Account Statements – Annual and Quarterly Statement of My Account
  - This consent agreement will also cover documents as they become available provided:
    - Funds Direct Canada Inc. is permitted, by law to provide the document electronically
    - Funds Direct Canada Inc. advises me by electronic mail or notice on the Web site that a document has been added
    - My consent profile is updated to include any additional documents
- Acknowledgment: 'I acknowledge that I am not required to consent to electronic delivery of documents and that by electing to receive the documents electronically; I However, I may receive, at no cost, a paper copy of any documents delivered electronically, by contacting us at: Funds Direct Canada Inc., Monday to Friday from 9:00 a.m. to 5:00 p.m. EST at 800-589-0980.'
- Understanding: 'I understand that I will be provided with a paper copy of any documents delivered electronically, if electronic delivery fails.'
- Customer Responsibilities**
  - This consent agreement will also cover other documents as they become available provided:
    - I am solely responsible for retrieving and viewing documents after being notified via email by Funds Direct Canada Inc. that my documents
    - I am responsible for informing Funds Direct Canada Inc. of any changes to my email address – which I can update through My Portfolio "SE"
- Notification: 'Notification for All documents delivered electronically will be delivered by e-mail to the email address listed here:'
- Email field: '\*your preferred email\*' (highlighted in yellow) with a dropdown arrow.
- Mobile App options:  Mobile App enabled and  Mobile App Q.
- Buttons: 'OK' and 'Cancel'.

## Funds Direct App

Check out the Funds Direct App available on the Apple App Store and the Google Play Store. With the app you are able to view your balances, track your performance, track transactions and more. Please note you must be registered for “My Portfolio” in order to log into the app. Use the same credentials that you set up above to log into your account using the app.

If you require further assistance with My Portfolio, please contact [clientcare@fundsdirect.ca](mailto:clientcare@fundsdirect.ca).