Client Self-Registration Guide

Welcome to Your Client Portal

Quick, easy, user-friendly view of your complete financial information.

How to Access FundEX Wealthview

From the FundEX public website (www.fundex.com), clicking "Client Access" or enter https://client.fundex.com in your browser.

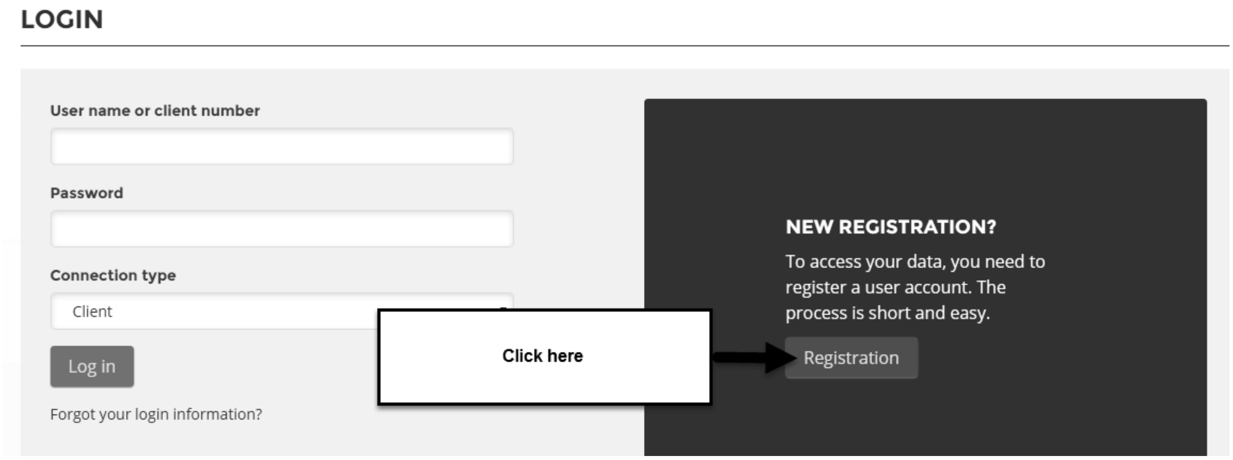
FundEX Wealthview Self-registration

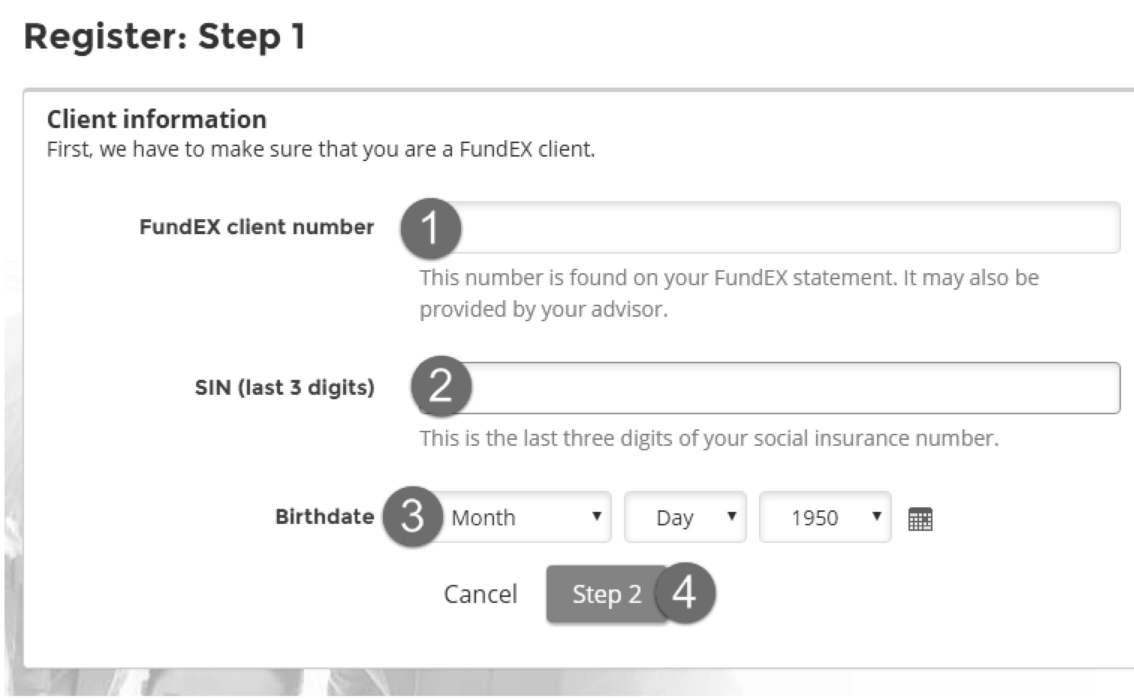
Clients cannot use the self-registration process for corporate accounts because a SIN is a required field. For corporate account holders, simply ask your Representative for a temporary password.

For joint accounts, the SIN and Date of Birth specified below must belong to the primary owner.

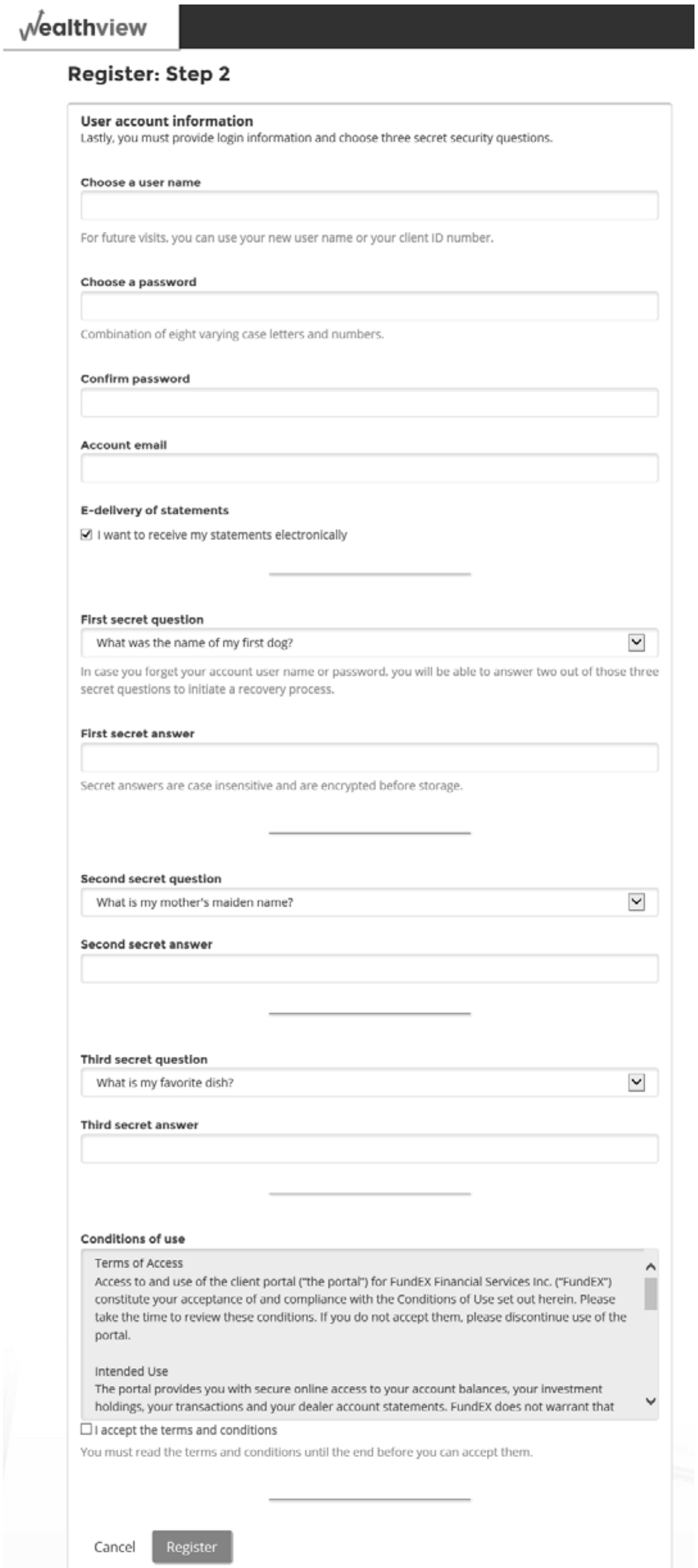
1. Prior to starting the self-registration process, you will need the following information to begin the process:
    a. Your FundEX client number: This number is found on your FundEX statement. It may also be provided by your advisor.
    b. SIN (last 3 digits): the last three digits of your social insurance number.
    c. Date of Birth

2. With all of the information available, click "Registration" and complete Step 1 and click Step 2.





3. On the first login, you will be asked to choose a username, password, and select 3 security questions for future password recovery requests.



Wealthview

Register: Step 2

User account information

Lastly, you must provide login information and choose three secret security questions.

Choose a user name

For future visits, you can use your new user name or your client ID number.

Choose a password

Combination of eight varying case letters and numbers.

Confirm password

Account email

E-delivery of statements

☑ I want to receive my statements electronically

First secret question

What was the name of my first dog?

In case you forget your account user name or password, you will be able to answer two out of those three secret questions to initiate a recovery process.

First secret answer

Secret answers are case insensitive and are encrypted before storage.

Second secret question

What is my mother's maiden name?

Second secret answer

Third secret question

What is my favorite dish?

Third secret answer

Conditions of use

Terms of Access

Access to and use of the client portal ("the portal") for FundEX Financial Services Inc. ("FundEX") constitute your acceptance of and compliance with the Conditions of Use set out herein. Please take the time to review these conditions. If you do not accept them, please discontinue use of the portal.

Intended Use

The portal provides you with secure online access to your account balances, your investment holdings, your transactions and your dealer account statements. FundEX does not warrant that

☐ I accept the terms and conditions

You must read the terms and conditions until the end before you can accept them.

Cancel Register

User name: You will have the choice to use your user name or your client number on subsequent visits.

Password and confirmation: This *new* password must include at least *8 digits and at least one number, one upper case letter and one lower case letter*.

Account email: The email address provided will be used for password recovery requests and email notifications for the electronic delivery of documents sent by FundEX, if applicable.

E-delivery of statements: The registration box is selected by default. If you prefer to receive statements by mail, please uncheck this box. You may also revoke the e-delivery preference at any time using the *Options - Settings* menu.

Secret questions: Please select and answer three questions to be used for future password recovery requests.

Conditions of use: You must acknowledge acceptance of the conditions by selecting the "*I accept the terms and conditions*" box.

Click Register to complete the registration process and you will be automatically redirected to the home page of Wealthview.

Please keep your username and password in a secure place for future use.

Want to learn more about your client portal? Click the link below for an overview video.

Client Portal Video

Client ID, Username or Password Recovery

Subsequent visits – Password recovery process

If you have previously successfully completed "*Register: Step 2*" (shown above) but have forgotten your password, click the "*Forgot your login information?"* link and enter your username or client number to initiate the password recovery process and follow the steps. A temporary password will be emailed to your email address on file.