Manulife Securities

How to send an invite with **Family access**

What can Family access do for me?

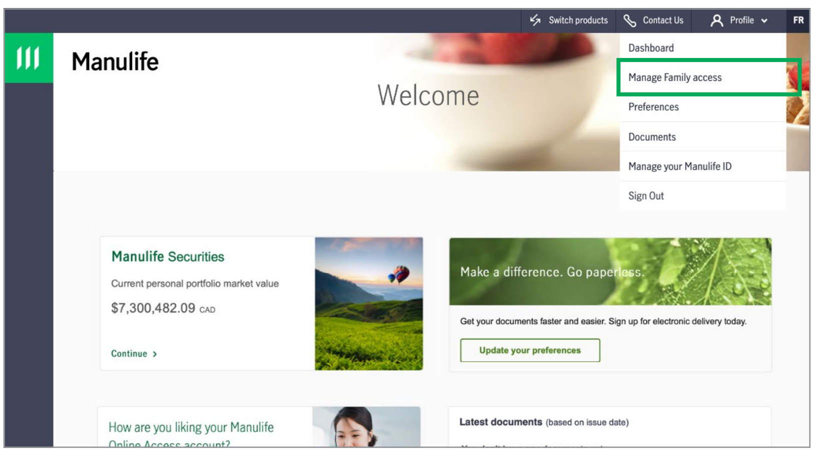
With Family access, you can safely invite Family contacts to view your personal accounts making it easier for trusted family members to view with your account values and activities.

Before you share your accounts...

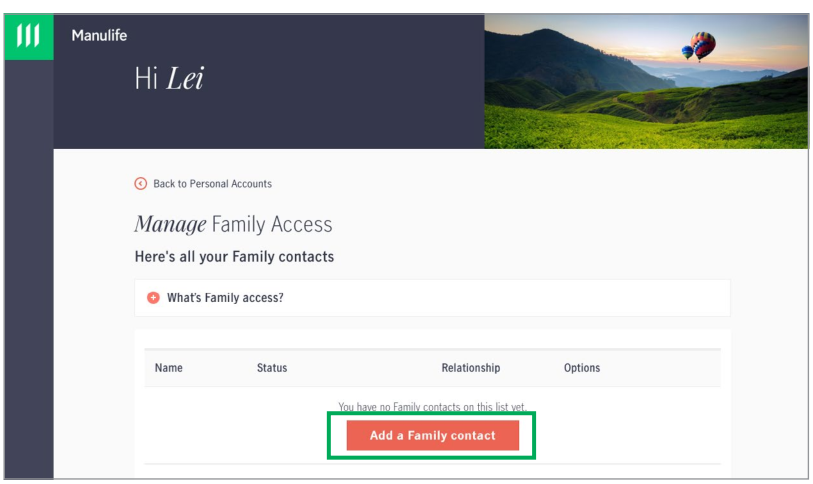
Keep in mind, you can only share and view accounts with Family contacts (like parents, partners and adult children) who both have an active Manulife Securities Account and are registered for Manulife online access.

Get started with a few simple steps:

1. Select the profile menu on the top right corner
2. Select **Manage Family access**



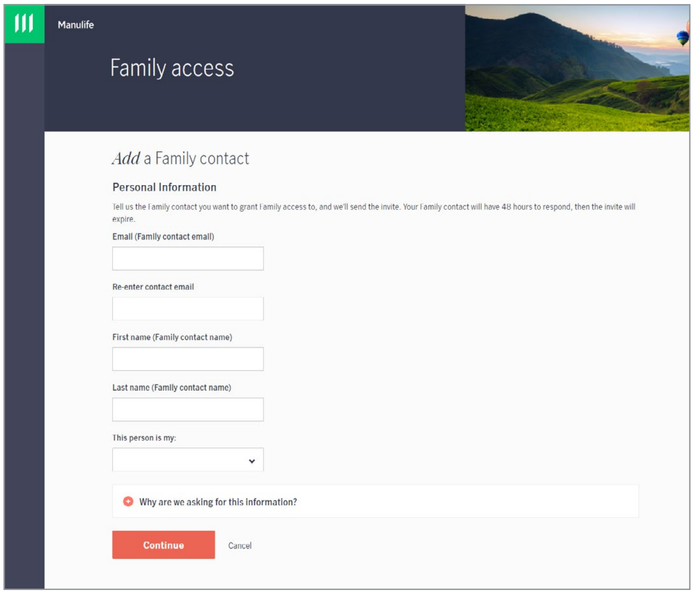
3. Add a family contact



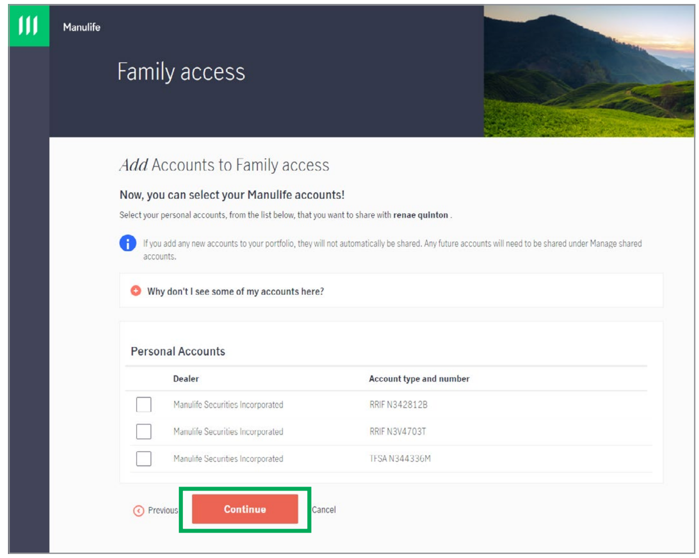
TIP!

Not on Manulife Online Access? All Manulife Securities Clients can register here: Manulife.ca/onlineaccess

4. Provide your contact's details



5. Add the accounts you'd like to share with your Family contact. Then select **continue**.



Once you accept our T&C, we will email your Family contact an invitation. That's it.

Once your Family contact accepts, the pending status will change to Active and they'll be able to see your view-only accounts.

Your Family contact will have 48 hours to accept it. You can view the status of your connections back on the Manage Family Access page.

When sharing your account...

You should only select the accounts you want to share with your family contact. Also, if you open any new accounts, they **will not** automatically be with your contact. Any future accounts will need to be shared under **Manage shared accounts.**

Why are some accounts not shown?

Certain accounts can't be shared (like joint, trust, estate and corporate accounts). For instance, joint accounts are already available to everyone who is authorized, so no need to share!

You can add or remove accounts you want to share at any time by selecting: **Manage your shared accounts**.