

How to send an invite with Family access

What can Family access do for me?

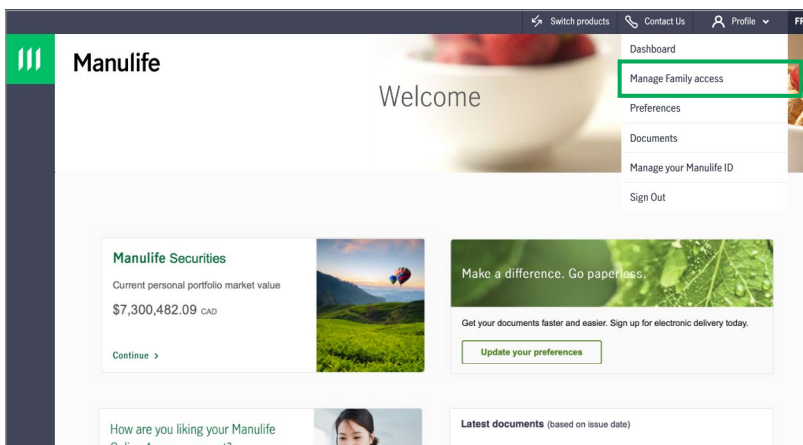
With Family access, you can safely invite Family contacts to view your personal accounts making it easier for trusted family members to view with your account values and activities.

Before you share your accounts...

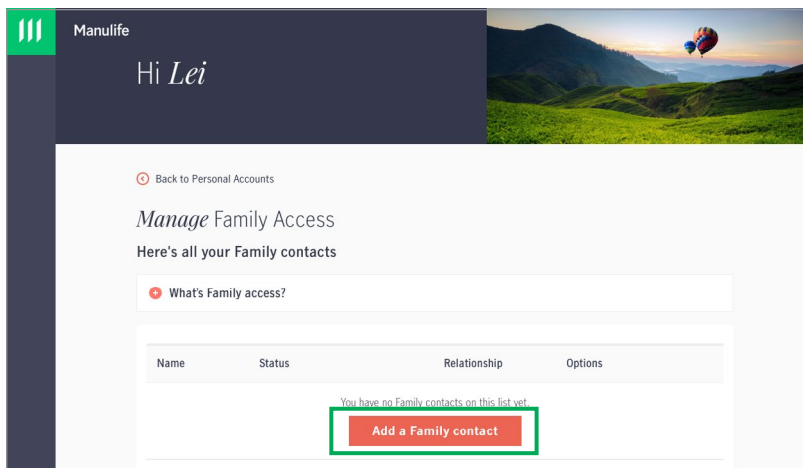
Keep in mind, you can only share and view accounts with Family contacts (like parents, partners and adult children) who both have an active Manulife Securities Account and are registered for Manulife online access.

Get started with a few simple steps:

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



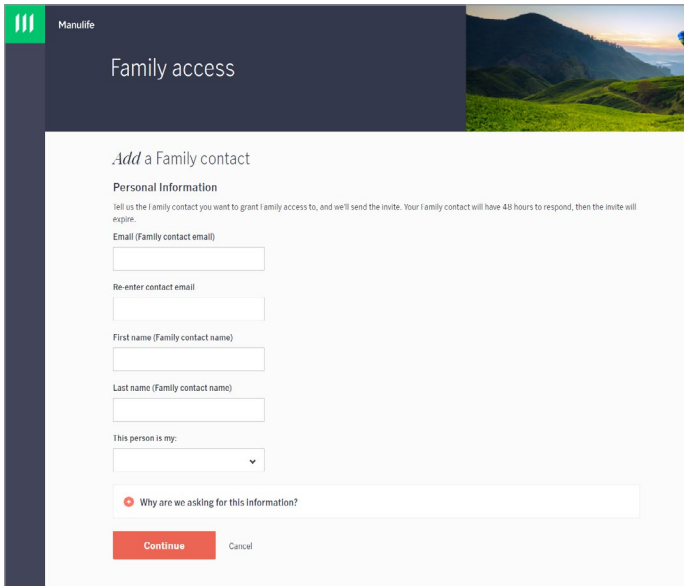
3. Add a family contact



TIP!

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

4. Provide your contact's details



Family access

Add a Family contact

Personal Information

Tell us the family contact you want to grant family access to, and we'll send the invite. Your family contact will have 48 hours to respond, then the invite will expire.

Email (Family contact email)

Re-enter contact email

First name (Family contact name)

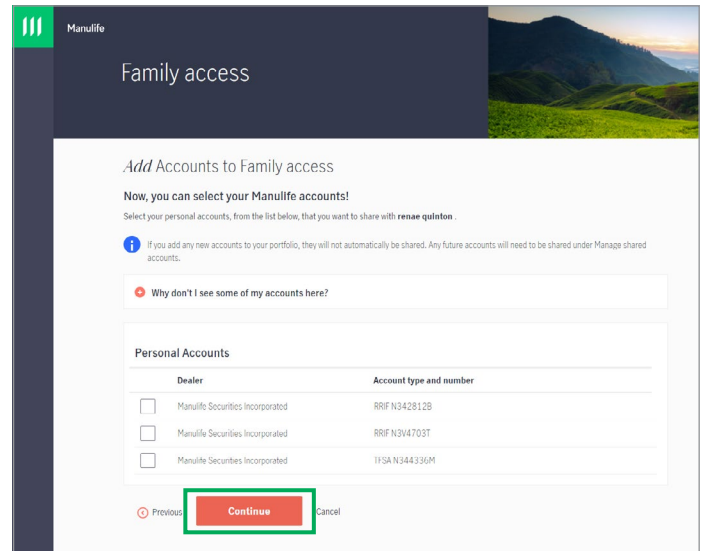
Last name (Family contact name)

This person is my:

Why are we asking for this information?

Continue Cancel

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



Family access

Add Accounts to Family access

Now, you can select your Manulife accounts!

Select your personal accounts, from the list below, that you want to share with **renee quinton**.

Why don't I see some of my accounts here?

Personal Accounts

Dealer	Account type and number
<input type="checkbox"/> Manulife Securities Incorporated	RRIF N342812B
<input type="checkbox"/> Manulife Securities Incorporated	RRIF N314703T
<input type="checkbox"/> Manulife Securities Incorporated	TFSA N344336M

Continue Previous Cancel



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**.