AdvisorOnline

AdvisorOnline provides fast, secure access to your CI book of business and includes up-to-date information on product, fund and CI news.

AdvisorOnline Highlights:

- Sales, Assets and Service Fee information
- Access to our Client account level information tool eCISS
- Access to account documents including statements and tax receipts
- Client account reports which include DSC, systematic plans and much more
- Summary of your clients recently settled and pending transactions
- Taxation, Retirement and Estate Planning Resources
- Professional Development

AdvisorOnline is available through the ADVISOR ACCESS link on CI.com

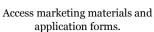




View client holdings, account documents, and generate reports

Statements available directly through AdvisorOnline

Review and download a report of settled transactions



Tab	Option(s)	Sub-Option(s)					
Your Book	Sales & Assets	Sales	Month-to-DateYear-to-DatePrevious Year	Review sales by Fund Advisor, Fund Family (Fund Product), Fund and Fund Code			
	Sales & Assets	Assets	 Assets Month-End Totals 	Review assets by Fund Advisor, Fund Family (Fund Product), Fund, Fund Code and Fund Type			
	Service Fees	 Review historical monthly trailer fees 					
	Account Search	 <i>eCISS</i> for access to detailed information on your clier accounts 					
Your Clients	Confirmation Transaction Summary	 View a summary of your clients' recently settled trades 					
Your Clients	Pending Transactions	> View a s	ummary of clients' per	nding transactions			
	Pending Registered Transfers	 View a summary of your clients' pending transfers-in 					
	Quick Docs	View cli					
	CI Preferred Pricing Reports						
	RESP Contribution/Eligibility Report						
	CI Guaranteed Retirement Cash						
	DSF Report						
	Household AUM Report						
	SWE & SWEP Fixed						
Reports	Inc Rebalance Forecast	Various high demand online summary reports, available in PDF and excel formats					
	SWE & SWEP Fixed Inc Rebalance						
	Segregated Funds Maturity Report						
	Systematic Plan Report						
	NR301 Non-Resident Client Listing						
	Additional Reports > option opens a page to request these additional reports:						

	Household AUM	
	Report	
	DSC Fee, 10% Free and	
	Mature Units	
	Current Client Assets	
	DSC Fee plus Maturity	
	Date	
	RESP Accounts – Beneficiary Info &	
	Grant/Contribution	
	Allocation	
	Pending Transactions	
	Your Reports	Your Reports - view reports you have recently requested
	Loan Program	 Up-to-date information and forms for Investment and RSP Loan programs
Services	Automatic Portfolio Rebalancing	 Maintain a preferred asset mix in each of your clients' accounts
	CI Wealth View	 Tools to assist in choosing best suited CI products and solutions
	Products	> Tap into our wide array of products and services
	Portfolio Management	 Review our investment style covering all disciplines: Value, Blend, Growth, Momentum
Marketing	Your Sales Team	> Up-to-date information about your sales team
	Material	 Access fund-related documents
	Events	 View details for upcoming educational conferences, seminars, and regionally-held events
Forms	Forms	 Find the most commonly used mutual fund, RESP, segregated funds, and spousal consent forms
	Online Order Form	Request forms and materials you use most frequently
	RESP	Review policy and procedural information
	Segregated Funds	News, tools and resource material
Administration	Corporate Class	 Understanding changes, marketing materials, client materials
	Preferred Pricing	 Illustration tool, CI linking form builder, reports and more information
Professional Development	> Advising the Client: o	online tools to enhance business; financial products & planning
TREP	➢ Tax, Retirement and	Estate Planning commentary and news



eCISS is your account access tool, providing you with information on your clients' accounts, including portfolio details, pending transactions and historical transactions.

eCISS Highlights:

- Access to detailed client and account-specific information
- Transaction history and fund holdings
- Access to your clients' portfolio details, including 10% DSC Free Units and current market value
- Access to copies of statements, confirmations, and tax slips

C Investments		Search: Advanced Fund Search	by Fund Name/Code 🗘 🐻 🙎	AdvisorOn YOUR BOOK YOUR CLENTS REPOR	line 5 services marketing forms administration professional developmen	
HOME ABOUT US LEGA	AL CONTACT US MC	I Financial	SITE MAP FRANÇAIS		the second se	7646/123-
> CLIENT ACCESS			Y QUICK LINKS EDIT	Your Book	CI Active Advisor Forum: Expert Market Knowledge & Advice for Success	CI Preferred Pricing Administration Centre
ADVISOR ACCESS	CIO BRANDON S		rices & Performance orporate Class ortfolio Select Series	Your Sales Your Clients	15 Cities April 30 - May 17 CE Credits Register Here	
> PRODUCTS	CAMBRID	orOnline		Account Search (eCISS) Transaction Confirmation Summary	For Financial Advisors Cony Fead more > 1 2 3	
PRICES & PERFORMANCE	Read more >			Pending Transactions	Important News	BRING YOUR CLENTS' FRANCIAL
> FUND CODES		Welcome to CI Advisoronline		Pending Registered Transfers	Important changes to advisor copies of client statements June 21 As our world becomes increasingly digitized, we know that the way you do business has in	CISS
	WHAT'S NEW	Advisorantine provides you with secure access to your sales and asse more!	ts, up-to-case client account intrimation, reparts, and much	Quick Docs	One of the things we have learned is that for many advisors, the paper copies of client stat we provide are not adding value. Through a recent survey of advisors, the overwhelming a	ccount Information Acc
SERVICES	> CI Investments an	Learn > mon < about the features available to you on Advisoroniline as	d eCISS, our account access tool.	Reports	stated they would prefer to receive copies of statements online. Read more >>	eCISS Document Centre
PORTFOLIO MANAGEMENT	funds > CI Corporate Class	Legis	First-line user?	Client Assuts		for client statements, tax receipts and trade confirmations.
FOR IT OLIO WANAGEWENT	> CI Investments an Investment Grade	 Enter your User ID and Password below If you use (CISS, you can log in with the same User ID and F Please sole that the User ID and Password validation function 	Por Albert D and Partwork, Call D Clert Service: at 1.806.563-5591 Manday to Feday, 8:00 a.m. to 8:00 p.m. EF	DSC, 10% Free and Matured Units	Expanded benefits for CI and Sentry clients as of September June 19, 2018 24	Help Search
TOOLS & CALCULATORS	> CI Investments fur	 Preve note that the User () and Passward valuable function scending (upperformer case) 	Need Help?	CI Preferred Pricing Reports	We are pleased to announce that effective September 24, 2018, we will be consolidating all CI and Sentry funds on a single back-office platform, resulting in greater benefits for you and your clients.	Cl Online Order Form
	Awards > Year-End Stateme	User ID	Call C Clevit Territors at 4.888.4824.499 Monday to Priday, 8:00 a.m. to 8:00 p.m. ET	RESP Contribution/Eligibility Report	The email communication sent to you on June 19, 2018 will provide you a trief overview of the benefits of this consolidation.	Cromme Order Form
LEARNING CENTRE	 > 2017 Annual Distri > Cl Investments fur 	Postward Postmiller Llow D	Impartant For the best possible experience using sur-website, we recommend using internet figures version 11 or lever.	SWE & SWEP Fixed Income Rebelance Report	If you have any questions please do not healtate to contact your CI Sales Team at 1-898-268-8374 or email us at connect@si.com.	Transaction
CAREERS	Lipper Fund Award	DHA	A list of must popular web browsers can be found below:	SWE & SWEP Fixed Income Rebalance Forecast Report	Security enhancement to AdvisorOnline and eCISS May 1, 2018	Confirmation
GANLENG	> Fund merger inton > First Accet Oppose	-0	S ڬ 🥭			Sattad Transaction

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3	Search Order Form P	roduct Information						
	Account Search							
	Account Number				Show	w All Accounts		
	Client Account	O Nominee Account			O Show	w Accounts Where	Market Value > \$0.00	
	O Dealer Account	O Old Account						
	SIN				Product T	ype	All	~
	Last Name				Account	Class	All	Y
	First Name				Plan Desi	gnation	All	~
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					Result Siz	te	50	
	PW Reporting Group Name				Result Siz	te	50	
	Submit Clea				Docu	ment Centre	First complete the Account Nu	mber field above

Tab	Option(s)	Sub-Option(s)
	Account	 Search by client name, account number, SIN, plan type or plan designation
	Wire Order	 Review the status of wire orders
Search	Distributions	 Search for Historical Distributions paid on specific funds
	Price History	 Search for current or historical prices for specific funds
Order Form	CIG Order Form	 Request forms and materials you use most frequently
Product Information	CI Investments	> Link to ci.com
	Account Details	 Review client owner and registration details
	Banking Information	 Review the banking information linked to your clients' accounts
	Client Mailing Address	 Make sure we have your clients' current mailing address on file
Account Information	RRSP Contribution (if applicable)	 Keep track of your clients' annual contributions
	Systematic Plan	 Review your clients' active and historical systematic plan details
	Certificates & Escrows	 Keep up to date on outstanding assignments on client accounts
	Auto Rebalance (if applicable)	 Maintain a preferred asset mix in each of your clients' accounts
	Pending Transactions	➤ Keep track of current trades
	Personal Rate of Return	 View account performance rates on active holdings
Financials	Portfolio Details	 Current assets, DSC Fee, Free and Mature Units, Current Assets and more
	Transaction History	 Historical fund and account activity

	Dividend Options	 View dividend options for each fund 			
	Historical Portfolio Summary	 Review historical account market values using different date parameters 			
Calculators	Redemption Calculator	 Calculate DSC fees payable using different what if scenarios 			
Registered Transfers	Registered Transfer Tracking	 Monitor incoming Registered Transfers 			
Document Centre	Doc Centre	 View and print copies of confirmations, statements, and tax slips as needed 			
	Family Group Information and History	 See accounts in the Family Group, tier, and most recent high watermark calculation 			
	Family Group Portfolio	View funds held by the Family Group			
	Statement Information and History	 See statement reporting for Family Group 			
	PW Reporting ROR	 Review account performance rates on active holdings 			
Family Group	Fee Rate Information	 Check Management Fee rate and Dealer Service Fee rate being applied to funds 			
	Fee Summary	 Summary of historical fees for the Family Group 			
	Trailing Commission Rate Information	 View Trailing Commission rate and Rebate rate for the Family Group 			
	Trailing Commission Summary	 Review historical trailing commission summary for the Family Group 			
Performance Score Card	 See performance information for funds held in your clients' accounts 				
Fund Selection	 Find funds available for purchase/switch based on load type, fund class, and/or asset class 				