

## Online Portal Registration

1. You will receive an email with the subject line: **Register to your online portal with OceanFront Investment Counsel Inc.**
2. The email will have 2 steps for you to complete by using your respective links as they appear in the screenshot example below:

We are pleased to provide you with access to your client portal, which will allow you to view your account balances, holdings and activities. To access your portal, follow the below steps:

1. **Create a password.** Click on the below link to confirm your email and create a password. Please create a unique password of at least 8 characters that contains one letter, one number, and one special character.

<https://oceanfront.investor.d1g1t.com/#/activate/OTlx/b210um-ca2fb244b4fba9cce1691caab5fb4f/>

**IMPORTANT:** this link will expire after 30 days.

2. **Access your client portal.** After your password has been created, use the following link to access your client portal: <https://oceanfront.investor.d1g1t.com> Your login details will be your email address and newly created password. We also encourage you to bookmark this link for future use.

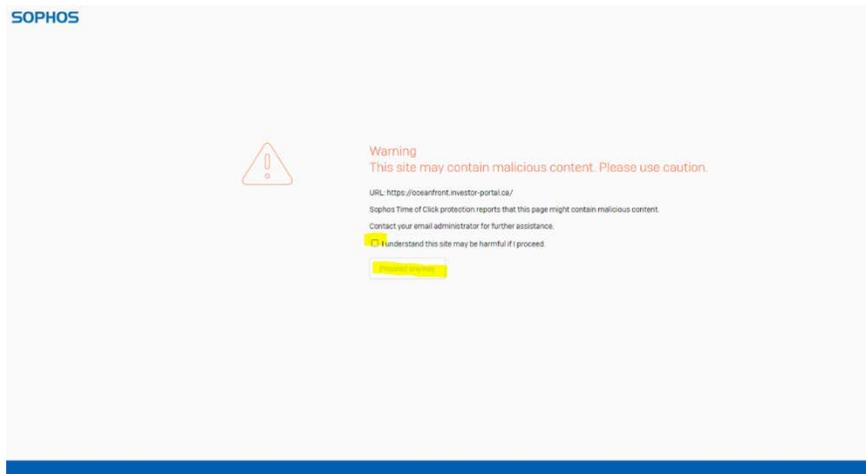
We encourage you to reach out to your advisor with any questions you may have or reach us at [info@oceanfrontwealth.com](mailto:info@oceanfrontwealth.com).

Thank You,

The OceanFront Investment Counsel Inc Team

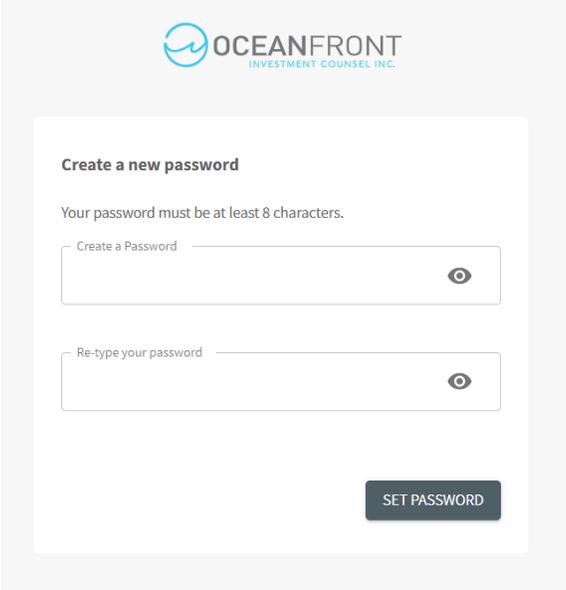
1055 W Georgia – Suite 2772 P.O. Box 11177 Vancouver BC V6E 4N3

**Note:** If your computer has the following warning, **please click the box “I understand this site may be harmful if I proceed”** and then click on the button to proceed.



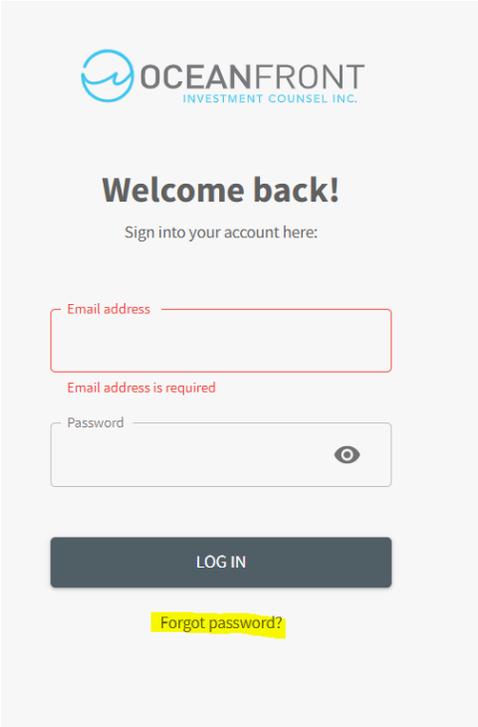
**This is due to computer security settings on the users end. You can verify it is a secure link by looking for the “https” at the start of the URL at the top right.**

**Step 1: Register your account and set up a password. The link will bring you to a page that looks like the screenshot below:**



The screenshot shows the 'Create a new password' page for Oceanfront Investment Counsel Inc. The page features the company logo at the top, followed by the heading 'Create a new password' and a note: 'Your password must be at least 8 characters.' Below this are two input fields: 'Create a Password' and 'Re-type your password', each with a toggle icon for visibility. A 'SET PASSWORD' button is located at the bottom right of the form area.

**Step 2:** Once your user credentials are set up, you can use the second link to access the sign in page. If you have forgotten your password, there is a forgot password function highlighted below on this page.



The screenshot shows the 'Welcome back!' sign-in page for Oceanfront Investment Counsel Inc. The page features the company logo at the top, followed by the heading 'Welcome back!' and the text 'Sign into your account here:'. Below this are two input fields: 'Email address' and 'Password'. The 'Email address' field has a red border and a red error message 'Email address is required' below it. The 'Password' field has a toggle icon for visibility. A 'LOG IN' button is located at the bottom of the form area. A yellow highlight is placed over the text 'Forgot password?' below the 'LOG IN' button.

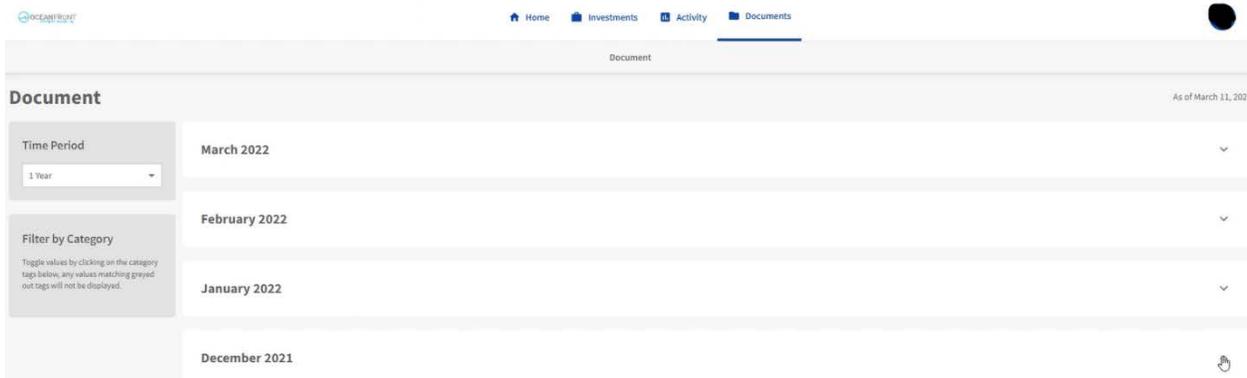
**Note:** We recommend bookmarking the above sign in page in your web browser for future use.

## Accessing Your Account Documents

1. When you initially sign into your portal, you will be brought to the home page with all your account information.
2. To access your documents, use the navigation along the top of the webpage and click on **"Documents"**.



3. From here, you will have access to the following documents:
  - a. Monthly statements.
  - b. Quarterly Reports.
  - c. Tax Documents.
4. All documents are organized by the date the documents were uploaded. To date, any tax related documents will show up in the January, February & March 2022 folders.



5. You can expand each monthly folder by clicking on the folder itself.
6. Once you have found the documents you are trying to retrieve, you can download the PDF to your computer by **clicking the download button on the right side.**

