

# Sign up for the new Investment Summary



Quadrus Investment Services Ltd.

The newest version of Investment Summary allows you to do more, including updating your email address and contact information. If you're already using Investment Summary, you need to register for the new site because it's on a new platform.

## Complete the registration in three easy steps.

*You'll need the last three digits of your social insurance number.*

1

Activate your online access

Step 1:  
Please insert your personal information to start the registration process.

Last 3 Digits of SIN

Date of Birth

MM DD YYYY

Your last name

Continue

Cancel

Click on your personalized registration link in the email sent from Quadrus Investment Services Ltd. The email will have a subject line that says, 'Register for our new site.'

Enter the last three digits of your social insurance number, select your date of birth using the down arrows, and enter your last name.

The spelling of your name needs to match what's on your statement exactly. If you're unsure, contact your advisor.

2

Activate your online access

Step 2:  
Create a new user name and password.

Username

enter your username

☐ Email as username

Password

Enter your password

• At least 5 characters  
• One lowercase character  
• One uppercase character  
• At least 1 numbers

Confirm password

Next

Create a unique username and password. You can make your email address your username by clicking on the **Email as username** field.

Enter the password you created in the **Confirm password** field.

Select **Next**.

3

Activate your online access

Step 3:  
Set up your security questions. We'll use your answers to help you reset your password if you forget it.

Select security question

Enter answer (not case sensitive)

Show

Select security question

Enter answer (not case sensitive)

Show

Select security question

Enter answer (not case sensitive)

Show

By registering, I agree to the Terms & Conditions

Activate

Set up security questions. This will help recover your account if you ever get locked out or forget your password.

Click the down arrow in the **Select security question** field and select a question. Type the answer in the **Enter answer** field. Repeat for the other two security questions.

After you've agreed to the terms and conditions, select the **Activate** button.

Now you're ready to use the new Investment Summary.

**Bookmark this link to the new site** for easy access to your investment information.