

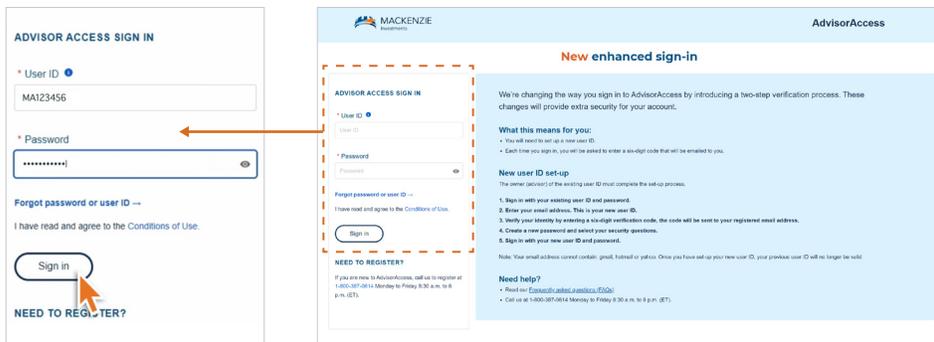
AdvisorAccess

New enhanced sign-in

As part of Mackenzie's commitment to improve the tools that support your business, we're modernizing and updating the AdvisorAccess sign-in and introducing two-step verification. These changes will provide an additional layer of security for your account.

1

Sign in to AdvisorAccess by entering your user ID and password. You will be prompted to set-up your new user ID in a few simple steps.



ADVISOR ACCESS SIGN IN

* User ID

* Password

Forgot password or user ID →

I have read and agree to the Conditions of Use.

Sign in

NEED TO REGISTER?

ADVISOR ACCESS SIGN IN

* User ID

* Password

Forgot password or user ID →

I have read and agree to the Conditions of Use.

Sign in

NEED TO REGISTER?

If you are new to AdvisorAccess, you will need to register at 1-800-387-0614 Monday to Friday 9:30 a.m. to 6 p.m. (ET).

NEED HELP?

- Visit our [Customer Support & Feedback Center](#)
- Call us at 1-800-387-0614 Monday to Friday 9:30 a.m. to 6 p.m. (ET).

2

Your new user ID will be your email address. Enter your email address, acknowledge our conditions of use, and confirm that you are the owner/advisor associated with the user ID.



Step 1: Set-up your new user ID

i Your email address is your new user ID. A verification code will be emailed to this address.

* Enter your email address

Confirm you are the owner/advisor for this user ID.

I have read and agree to the Conditions of Use.

Continue to Step 2



3

You will receive an email containing a six-digit verification code. It may take a few minutes to receive the email. If you have not received it, check your junk folder. We recommend that you add our email address to your safe sender list. Enter the verification code.

The image shows two parts of the verification process. On the left is an email from Mackenzie Investments with the subject 'Test'. The email body contains a one-time verification code for AdvisorAccess, which is 182689. The code is valid for 15 minutes. Below the code is a warning that it is an automated message and should not be replied to. On the right is a web form titled 'Step 2: Verify your identity'. It prompts the user to enter the six-digit verification code emailed to name@mackenzieinvestments.com. The code 182689 is entered into the 'Verification code' field. A 'Continue to Step 3' button is visible, along with a 'Resend' link for users who didn't get the code.

4

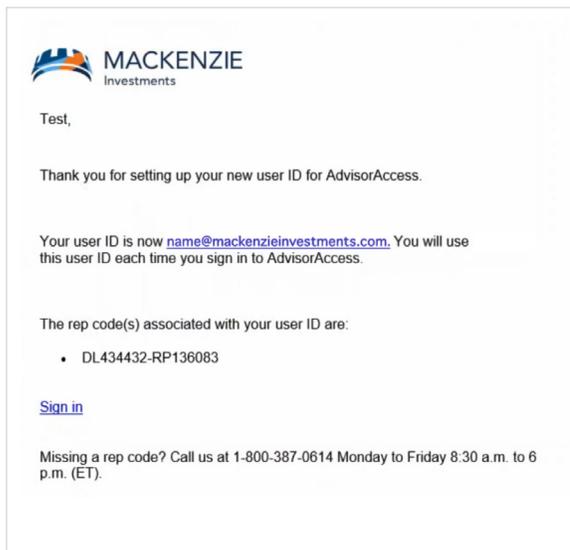
Create a new password and set up your new security questions.

The image shows a web form titled 'Step 3: Create your password & security questions'. It has two main sections. The first section is 'Enter new password', which includes a password input field with a strength indicator. Below the field are five requirements for a strong password: 1 lowercase letter, 1 uppercase letter, Min 8 characters, 1 special character (from a list: ! # \$ % - _ = + < >), and No blank spaces. The second section is 'Re-enter new password', which includes a second password input field.



5

And that's it! Your new user ID has been set up and you will receive an email and on-screen confirmation. Now sign in with your new credentials. Remember that your email address is now your user ID.



6

Now, each time you sign in, we will send a verification code to your email. These changes provide an extra layer of security for your account.

Need help? Call our Client Relations Team at 1-800-387-0614 Monday to Friday 8:30 a.m. to 6 p.m. (ET).