

GUIDELINES TO OBTAINING COMMISSION STATEMENTS IN COPOLOFF CENTRALE /INVESTMENTS

STEP 1: YOU MUST USE INTERNET EXPLORER

STEP 2: Pop up Blocker must be disabled :

Go to Tools select "Pop up Blocker" Turn "Off Pop up Blocker"

STEP 3 : GO TO https://investment.copoloffcentrale.com

STEP 4 : LOGGING IN

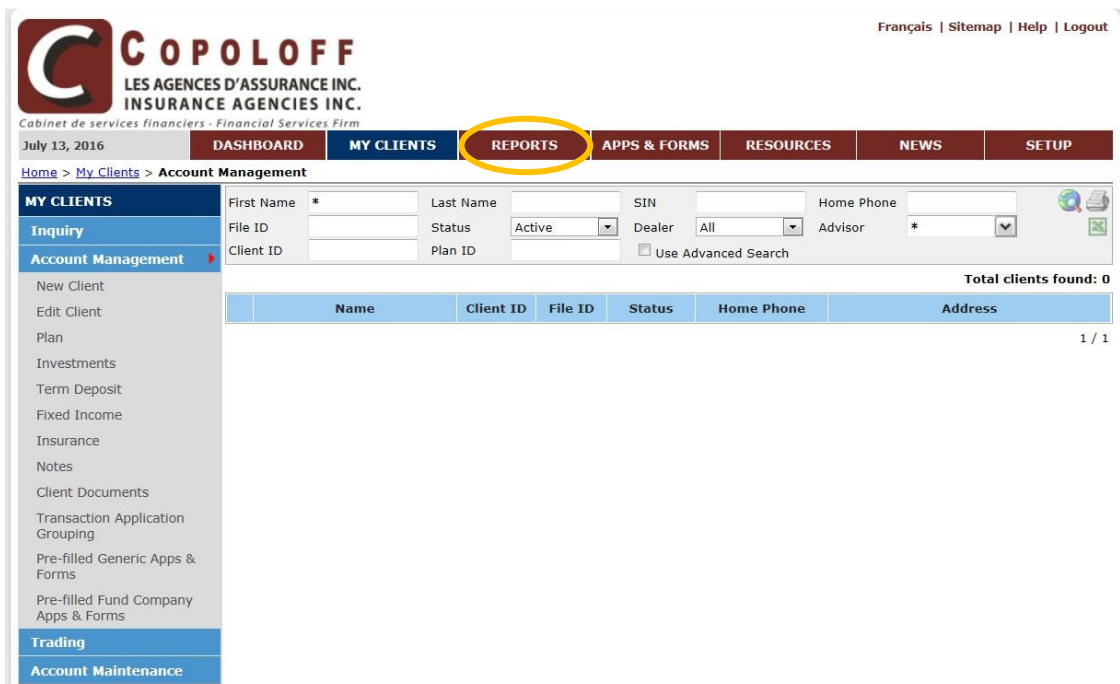
Enter your **USER ID** and **PASSWORD** and choose your **PREFERRED LANGUAGE**



The screenshot shows the 'Member Login' page. At the top left is the Copoloff logo and name. At the top right, it says 'Welcome / Bienvenue'. The main heading is 'Member Login' and 'Ouverture de session du membre'. Below this, there are input fields for 'Dealer ID / ID courtier' (with the value '324'), 'User ID / ID utilisateur', and 'Password / Mot de passe'. There is a checkbox for 'Change Password / Modifier mot de passe'. At the bottom of the login section are two buttons: 'English' and 'Français'. Below the login section, there are two small icons: 'Microsoft Internet Explorer' and 'Get Adobe Reader', with text indicating compatibility requirements for each.

STEP 5: HOW TO FIND YOUR COMMISSION STATEMENT PAYABLE BY EFT

Click on the "REPORTS" tab at the top of the screen



The screenshot shows the dashboard of the Copoloff website. At the top left is the Copoloff logo and name. At the top right, there are links for 'Français | Sitemap | Help | Logout'. Below the logo, there is a navigation menu with tabs: 'DASHBOARD', 'MY CLIENTS', 'REPORTS' (highlighted with a yellow circle), 'APPS & FORMS', 'RESOURCES', 'NEWS', and 'SETUP'. Below the navigation menu, there is a breadcrumb trail: 'Home > My Clients > Account Management'. The main content area is titled 'MY CLIENTS' and contains a search form with fields for 'First Name *', 'Last Name', 'SIN', 'Home Phone', 'File ID', 'Status' (set to 'Active'), 'Dealer' (set to 'All'), and 'Advisor'. There is also a checkbox for 'Use Advanced Search'. Below the search form, there is a table with columns: 'Name', 'Client ID', 'File ID', 'Status', 'Home Phone', and 'Address'. The table is currently empty, and it says 'Total clients found: 0'. At the bottom right of the table, it says '1 / 1'. On the left side of the dashboard, there is a sidebar menu with various options: 'Inquiry', 'Account Management' (with a red arrow), 'New Client', 'Edit Client', 'Plan', 'Investments', 'Term Deposit', 'Fixed Income', 'Insurance', 'Notes', 'Client Documents', 'Transaction Application Grouping', 'Pre-filled Generic Apps & Forms', 'Pre-filled Fund Company Apps & Forms', 'Trading', and 'Account Maintenance'.

Click on the "DEALER GENERATED" tab on the left hand side

The screenshot shows the Copoloff web application interface. At the top, there is a navigation bar with the company logo and name: "COPOLOFF LES AGENCES D'ASSURANCE INC. INSURANCE AGENCIES INC." Below this is a secondary navigation bar with tabs: "DASHBOARD", "MY CLIENTS", "REPORTS", "APPS & FORMS", "RESOURCES", "NEWS", and "SETUP". The "REPORTS" tab is selected. On the left side, there is a sidebar menu with the following items: "Client", "Account Summary Report", "Asset Mix Report", "Client KYC", "Client Label", "Client ROR Report", "Client Transactions", "Detailed Client List", "Do Not Call List", "FATCA Report", "GIC Maturity Notice", "KYC Review Date", "Portfolio Report", "Administrative", "Dealer Generated", and "Report Centre". A yellow arrow points to the "Dealer Generated" item. The main content area shows a search form for clients with fields for First Name, Last Name, SIN, Home Phone, File ID, Status, Dealer, and Advisor. Below the search form, it says "Total clients selected: 0" and "Total clients found: 0". A table with columns "Name", "Client ID", "File ID", "Status", "Home Phone", and "Address" is shown, with "1 / 1" records listed.

Select the date range and click SEARCH

The screenshot shows the Copoloff web application interface. At the top, there is a navigation bar with the company logo and name: "COPOLOFF LES AGENCES D'ASSURANCE INC. INSURANCE AGENCIES INC." Below this is a secondary navigation bar with tabs: "DASHBOARD", "MY CLIENTS", "REPORTS", "APPS & FORMS", "RESOURCES", "NEWS", and "SETUP". The "REPORTS" tab is selected. On the left side, there is a sidebar menu with the following items: "Clients", "Administrative", and "Dealer Generated". The "Dealer Generated" item is selected. The main content area shows a search form for "Dealer Generated Reports" with fields for Category, Type, Status, Currency, Advisor, Date From, and Date To. The "Date From" field is set to "05/01/2016" and the "Date To" field is set to "07/13/2016". A red arrow points to the "SEARCH" button, which is a magnifying glass icon. Below the search form, it says "Total records found: 566".

The links to your commission statement(s) will appear under File Name. Select the link to retrieve your statement

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