Guideline to copoloffcentrale: WConnect Investments

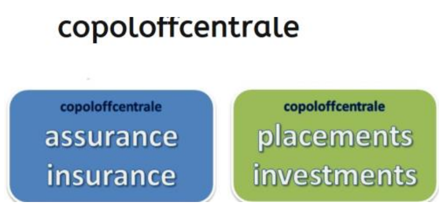
You have been provided with a Fundserv code. This 4- digit code identifies you as the representative for your Segregated Fund Clients (*excluding RBC Insurance and La Capitale*). You must indicate your FundServ code on all Seg fund applications as well as when contacting Head Offices.

Pop up Blocker must be disabled for use in Wconnect – (we recommend using Internet Explorer)

- **Go to Tools ➔ Select "Pop up blocker" ➔Turn "OFF Pop up blocker"**

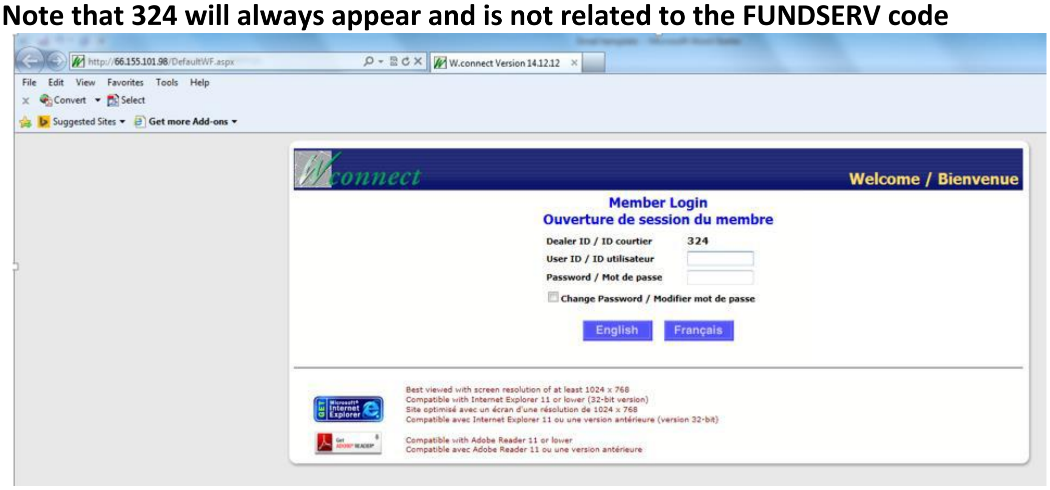
STEP 1: GETTING STARTED

- **Go to www.copoloffcentrale.com**
- **Select investments**



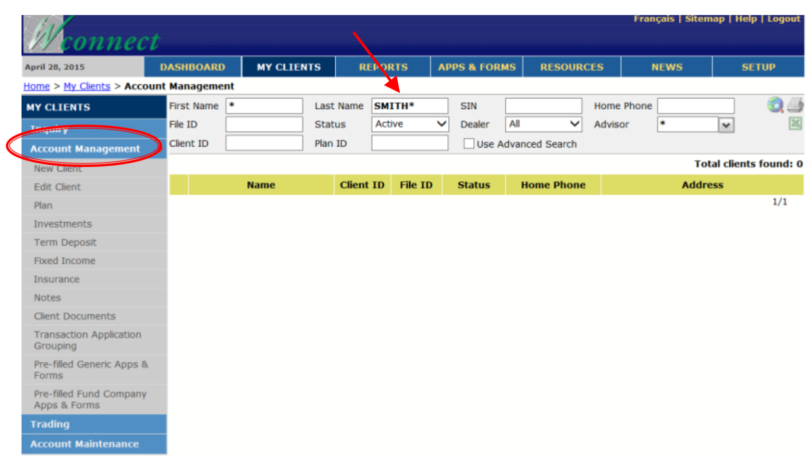
Step 2: LOGGING IN

- **Enter your USER ID and password**
- **Choose your preferred language**
- **Note that 324 will always appear and is not related to the FUNDSERV code**



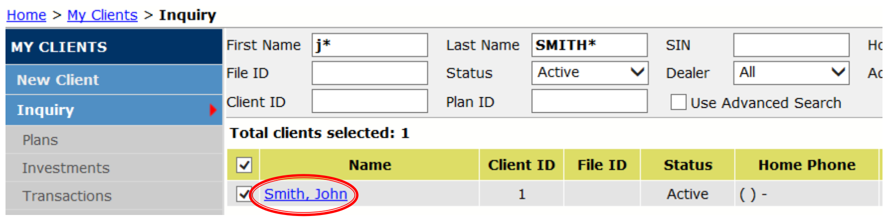
Step 3: FIND YOUR CLIENTS

- **Select Account Management and search by either first or last name**
  - *You may also search by partial name if you put a star (*) i.e. If you search S*, all your clients with the last name beginning with "S" will be found.*

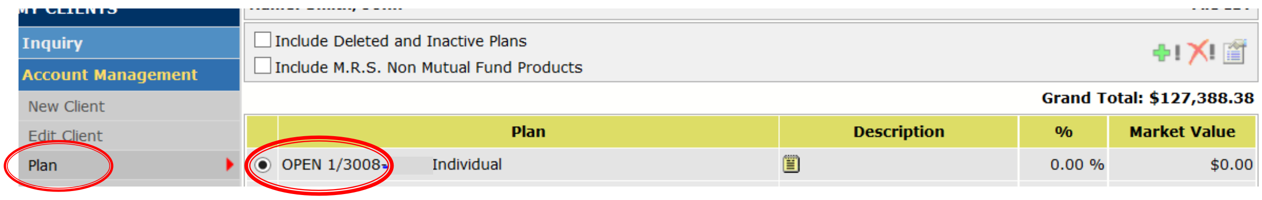


Always remember to click on to search

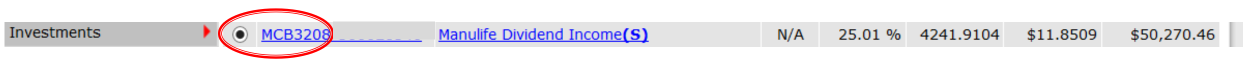
Select your client



Select the plan

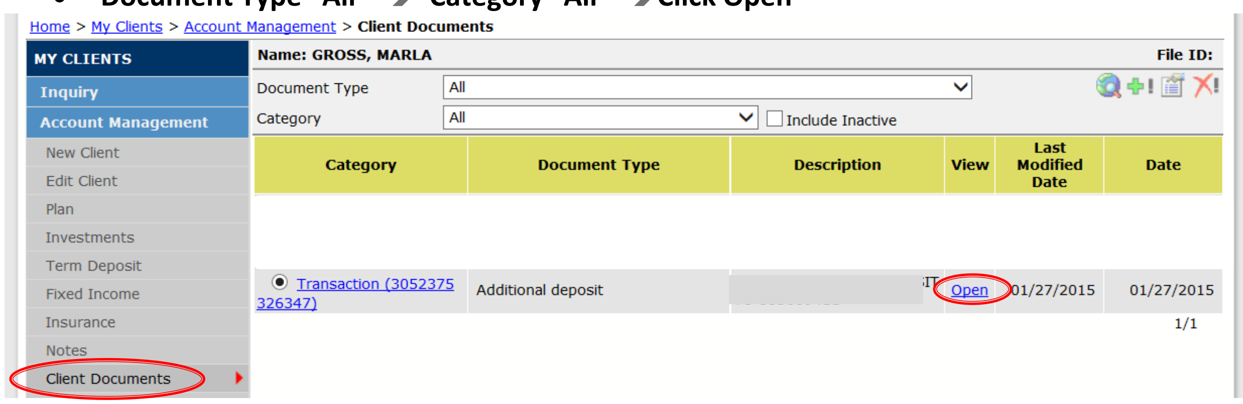


Select Investments



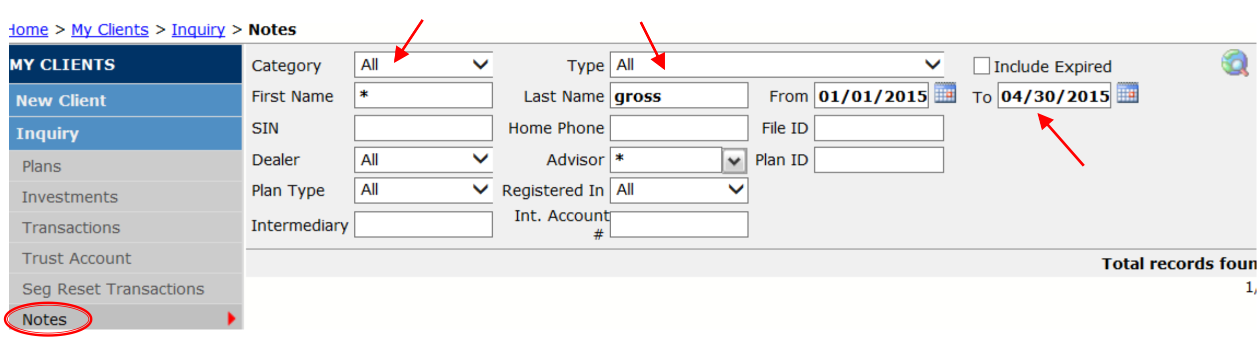
STEP 4: VIEW CLIENT DOCUMENT

- **Document Type "All" → Category "All" →Click Open**



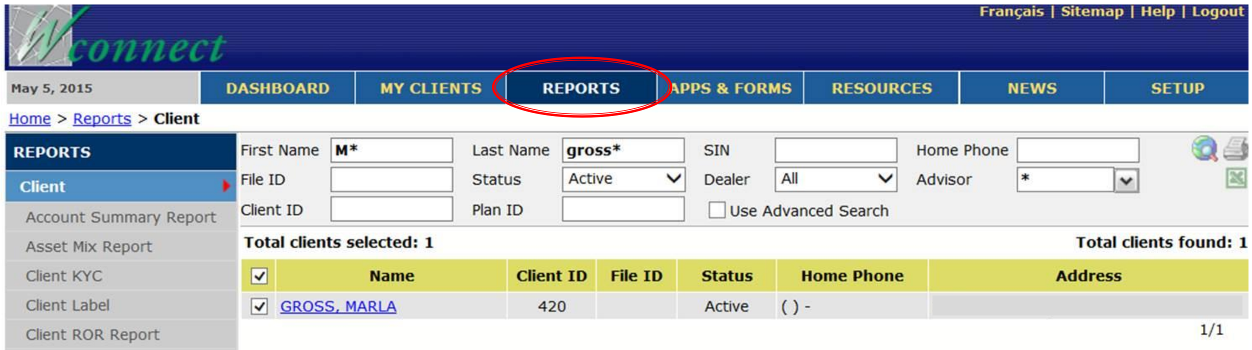
STEP 5: VIEW NOTES

- **Select "Notes" → Choose Date Range → Category "All" → Type "All" → Search**



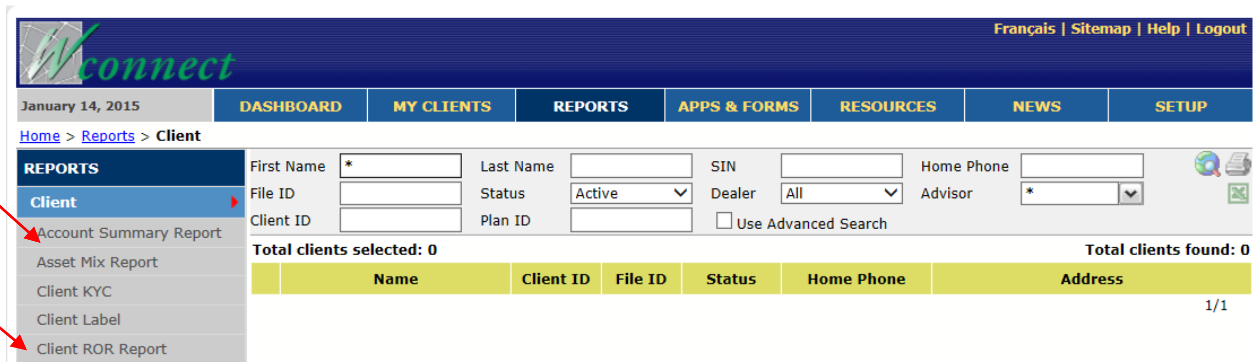
STEP 6: CONSOLIDATED STATEMENT

- **Select "Reports"**



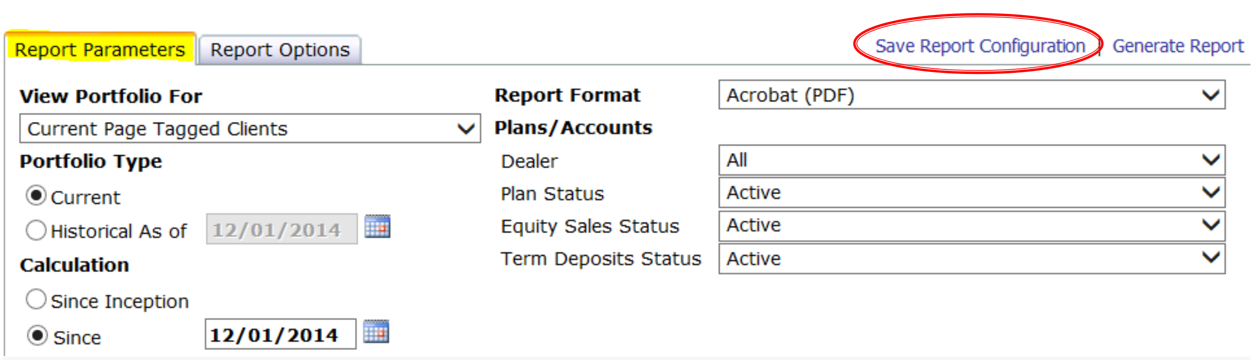
There are Two Options:

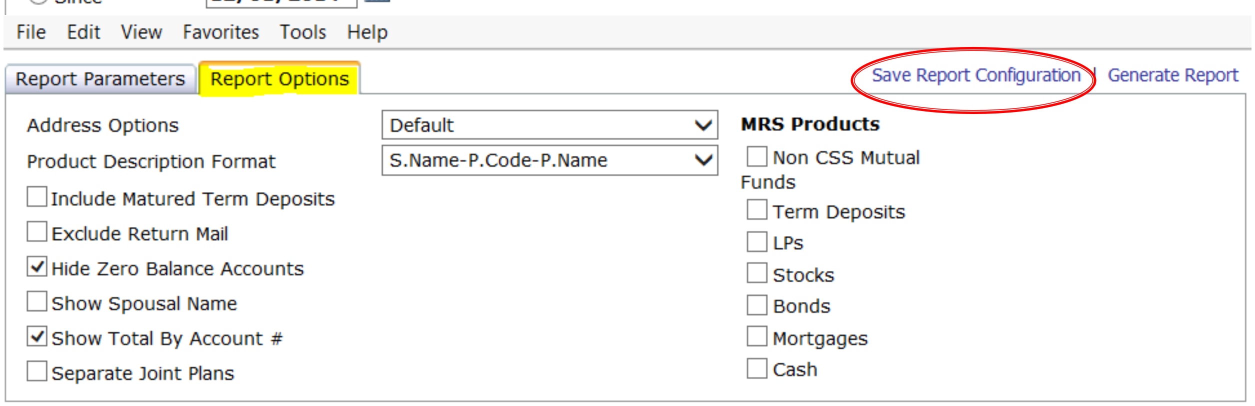
1) Account Summary Report 2) Client ROR report



Set Preferences: The following are recommended

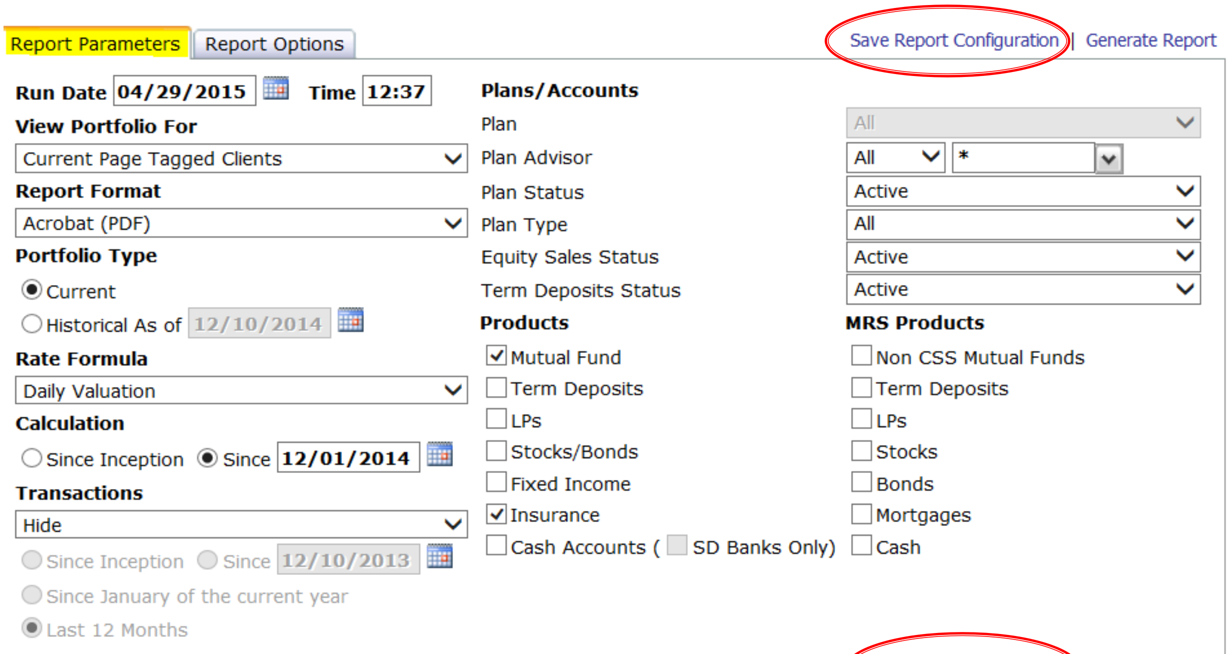
1) Account Summary Report:

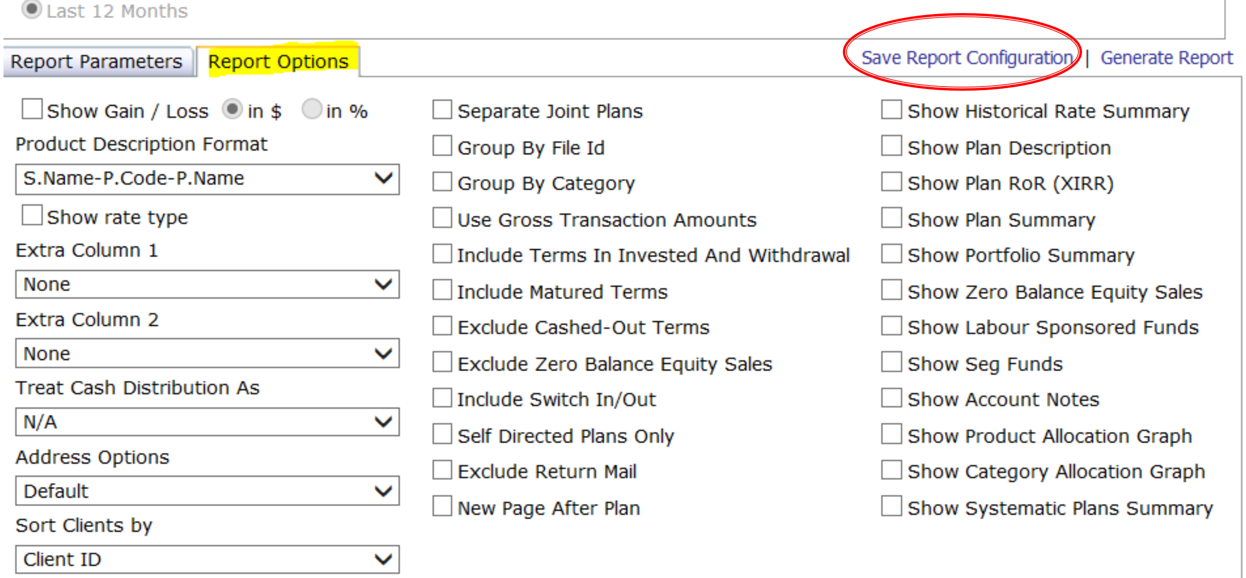




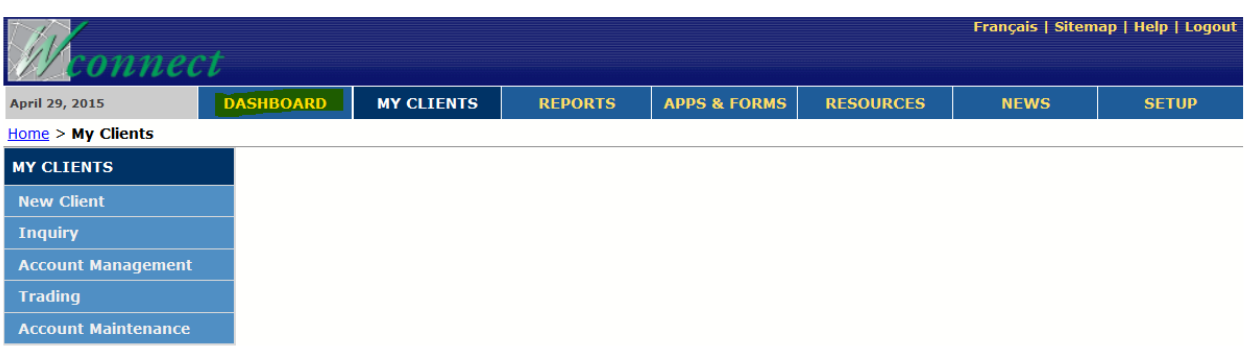
Once complete, save configuration and Generate Report

2) Client ROR:

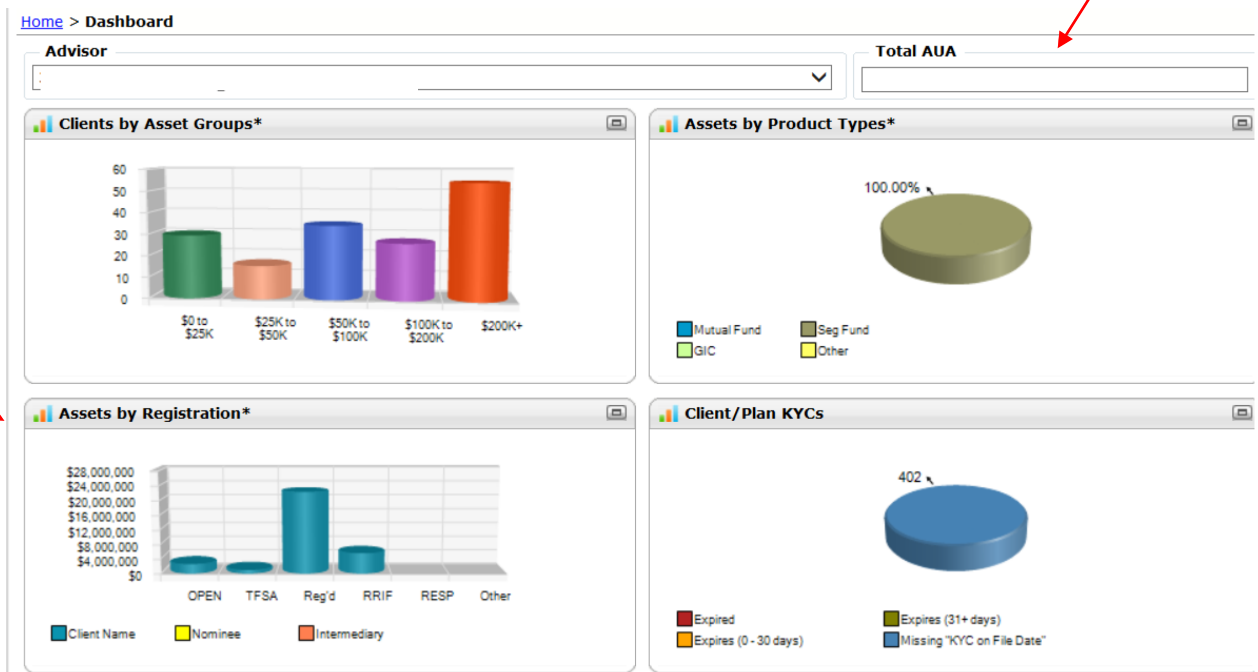




STEP 7: DASHBOARD – Provides total Assets under Management



Can break your clients down by Asset Groups, by Company and/or Registration



Watch the Training Video HERE

For assistance please contact the Copoloff Investment Team : investments@copoloff.com

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