



HOW TO VIEW MY CLIENTS' SUBSCRIPTIONS FOR THEIR ONLINE STATEMENTS

Once connected to your MyPEAKonline account, go to the section: **STATEMENT PREFERENCES**.

The screenshot displays the MyPEAKonline dashboard. At the top right, there are links for Home, PEAK's public site, Français, and Sign out. The main header includes the MyPEAKonline logo, technical support information (1 877 844-4481 option 2 or 514 844-6911, service@peakgroup.com), and the PEAK INDEPENDENCE logo with the tagline 'AT THE CORE OF A SOLID NETWORK'. The dashboard is divided into several sections: a left sidebar with the PEAK logo, agent name, and contact information; a central area with a welcome message and two main tiles: 'CLIENTS' PORTFOLIO' (with a line graph showing values like 1.7990 and 1.7945) and 'MY PRACTICE' (with a photo of a woman and a man); and a right sidebar titled 'LINKS' containing a list of navigation options. The 'STATEMENT PREFERENCES' link is highlighted with a red box.

Home | PEAK's public site | Français | Sign out

MyPEAKonline

Technical support : 1 877 844-4481 option 2 or 514 844-6911
service@peakgroup.com

PEAK INDEPENDENCE
AT THE CORE OF A SOLID NETWORK

Welcome, **Agent Name**

CLIENTS' PORTFOLIO

Access my clients' portfolio

+Info >>

MY PRACTICE

All I need to know about the services provided by my Advisor

+Info >>

LINKS

- > HOME
- > CLIENT ACCESS MANAGEMENT
- > CLIENT LOGIN HISTORY
- > **STATEMENT PREFERENCES**
- > MANAGE PREFERENCES
- > CLIENT TAX FORMS
- > VAULT
- > FREQUENTLY ASKED QUESTIONS

Agent Name

Mutual Fund Representative
PEAK Investment Services Inc

My contact information

Phone: (819) [redacted]
Toll free: (866) [redacted]
Fax: (819) [redacted]

[redacted]@groupepeak.com

In this section, you can consult the delivery options chosen by your clients for Account Statements.

A drop-down list with the following options: *All*, *Online* and *Paper* are available. Select an item from this list to display clients with the option chosen.

The email displayed for clients is the email corresponding to their MyPEAKonline account.

MyPEAKonline

[Home](#) | [PEAK's public site](#) | [Français](#) | [Sign out](#)

Technical support : [1 877 844-4481](tel:18778444481) option 2 or [514 844-6911](tel:5148446911)
service@peakgroup.com



Agent Name

Mutual Fund Representative
PEAK Investment Services Inc

Phone: (819)

Toll free: (866)

Fax: (819)

@groupepeak.com

STATEMENT PREFERENCES

ALL
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B
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Clients' statement preferences			
Client ID	Client Name	Email	Account Statements
▶ 16376872			<div style="border: 1px solid #ccc; padding: 2px;"> All Online Paper </div>
▶ 16686141			Paper
▶ 16222410		@videotron.ca	Online
▶ 16232641		@videotron.ca	Online
▶ 16282187		@gmail.com	Online
▶ 16850612			Paper
▶ 16291532			Paper
▶ 16245803		@videotron.ca	Online
▶ 16853596			Paper
▶ 25879789		@csrs.qc.ca	Online

10 Total of clients: 315. Page 1 of 32 [Next >](#) [Last >>](#)

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For example, if you want to have a list of your clients who have chosen paper delivery for their Account Statements, choose **Paper** from the Account Statements drop-down list. Make sure the **ALL** button next to *Search* is selected to query all of your clients. The number of clients who have this option will be displayed at the bottom of the table.

If you want to export this list, simply click on the **Generate Excel File** button.

Agent Name

Mutual Fund Representative
PEAK Investment Services Inc

Phone: (819)
Toll free: (866)
Fax: (819)

@groupepeak.com

LINKS

- > HOME
- > CLIENTS' PORTFOLIO
- > CLIENT TAX FORMS
- > CLIENT ACCESS MANAGEMENT
- > FREQUENTLY ASKED QUESTIONS

STATEMENT PREFERENCES

Clients' statement preferences

Client ID	Client Name	Email	Account Statements
▶ 16241985		<input type="text"/> @usherbrooke.ca	Paper
▶ 16225690			Paper
▶ 16272713			Paper
▶ 16321791			Paper
▶ 16339723			Paper
▶ 16378173			Paper
▶ 16834918		<input type="text"/> @hotmail.com	Paper
▶ 16232634	Doe, John	jDoe@yahoo.com	Paper
▶ 16285738			Paper
▶ 16312807			Paper

Go to:

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