


## HOW TO VIEW MY CLIENTS' SUBSCRIPTIONS FOR THEIR ONLINE DOCUMENTS

Once connected to your MyPEAKonline account, go to the section: **CLIENT SETTINGS MANAGEMENT**.



The screenshot shows the MyPEAKonline user interface. At the top, there is a navigation bar with links for Home, PEAK's public site, Français, and Sign out. Below this, the MyPEAKonline logo is on the left, and technical support information (1 877 844-4481 option 2 or 514 844-6911, service@peakgroup.com) is in the center. On the right, the PEAK INDEPENDENCE logo is displayed with the tagline 'AT THE CORE OF A SOLID NETWORK'.

The main content area is divided into two columns. The left column contains a welcome message 'Welcome, Agent Name' and two tiles: 'CLIENTS' PORTFOLIO' (with a line graph) and 'MY PRACTICE' (with a photo of a couple). The right column is a sidebar titled 'LINKS' containing a list of navigation options: HOME, CLIENT ACCESS MANAGEMENT, CLIENT LOGIN HISTORY, CLIENT SETTINGS MANAGEMENT (highlighted with a red box), MANAGE PREFERENCES, CLIENT TAX FORMS, VAULT, FREQUENTLY ASKED QUESTIONS, CLIENT CONFIRMS, and MONTHLY STATEMENTS.

At the bottom of the sidebar, the date 'Date: 04/06/2020' is shown, along with links for S&P TSX, Dow Jones, and Nasdaq.

In this section, you can consult the delivery options chosen by your clients for Account Statements, Transaction Confirms and Tax Slips.


Each type of document corresponds to a drop-down list with the following options: All, Electronic and Paper. 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.

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 and keep **All** option for the others 2 drop-down lists. 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.

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MyPEAKonline

Technical support : 1 877 844-4481 option 2 or 514 844-6911

service@peakgroup.com

Agent Name

Investment Advisor  
PEAK Securities Inc.

Phone: (514)

Fax: (514)

@peakgroup.com

LINKS

- » HOME
- » CLIENTS' PORTFOLIO
- » MONTHLY STATEMENTS
- » CLIENT TAX FORMS
- » CLIENT'S TRANSACTION CONFIRMS
- » CLIENT ACCESS MANAGEMENT
- » FREQUENTLY ASKED QUESTIONS

CLIENT SETTINGS MANAGEMENT

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Generate Excel File

Client ID

Client Name

Email

Account Statements

Transaction Confirms

Tax Slips

			Paper	All	All
1110566		@videotron.ca	Paper	Paper	Paper
1102175		@videotron.ca	Paper	Paper	Paper
1106985		@gmail.com	Paper	Paper	Paper
1104241			Paper	Paper	Paper
1104467			Paper	Paper	Paper
1105105			Paper	Paper	Paper
1106984		@bell.net	Paper	Paper	Paper
1104375			Paper	Paper	Paper
1093500		@videotron.ca	Paper	Paper	Paper
1111047			Paper	Paper	Paper

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Total of clients: 53. Page 1 of 6

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Go to:

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If you want to have the list of your clients who have chosen paper delivery for their Transaction Confirms, choose **Paper** in the Transaction Confirms drop-down list and keep **All** option for the others 2 drop-down lists. 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.

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CLIENTS' PORTFOLIO

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CLIENT TAX FORMS

CLIENT'S TRANSACTION CONFIRMS

CLIENT ACCESS MANAGEMENT

FREQUENTLY ASKED QUESTIONS

Client ID

Client Name

Email

Account Statements

Transaction Confirms

Tax Slips

All

Paper

All

1117985			Electronic	Paper	Paper
1110566		@videotron.ca	Paper	Paper	Paper
1102175		@videotron.ca	Paper	Paper	Paper
1106985		@gmail.com	Paper	Paper	Paper
1104241			Paper	Paper	Paper
1104467			Paper	Paper	Paper
1105105			Paper	Paper	Paper
1106984		@bell.net	Paper	Paper	Paper
1122803		@hotmail.com	Electronic	Paper	Paper
1104375			Paper	Paper	Paper

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Total of clients: 66

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If you want to have a list of your clients who have chosen paper delivery for their Tax Slips, choose *Paper* from the Tax Slips drop-down list and keep *All* option for the others 2 drop-down lists. 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.

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Generate Excel File

Client ID

Client Name

Email

Account Statements

Transaction Confirms

Tax Slips

All

All

Paper

1117985		@videotron.ca	Electronic	Paper	Paper
1110566		@hotmail.com	Paper	Paper	Paper
1105660		@videotron.ca	Electronic	Electronic	Paper
1102175		@videotron.ca	Paper	Paper	Paper
1106985		@gmail.com	Paper	Paper	Paper
1109072		@ville.montreal.qc.ca	Electronic	Electronic	Paper
1110872		@yahoo.ca	Electronic	Electronic	Paper
1104241			Paper	Paper	Paper
1112699		@sympatico.ca	Electronic	Electronic	Paper
1110651		@ville.dorval.qc.ca	Electronic	Electronic	Paper

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Total of clients: 135

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2000 Mansfield Street, 18th Floor, Montreal, QC H3A 3A6

www.peakgroup.com

If you want to have a list of your clients who have chosen electronic delivery for all their documents, choose **Electronic** from each 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 for all their documents will be displayed at the bottom of the table.

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CLIENT SETTINGS MANAGEMENT

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Generate Excel File

Clients' online documents preferences

Client ID	Client Name	Email	Account Statements	Transaction Confirms	Tax Slips
			Electronic	Electronic	Electronic
1101112	Doe, John	jtremblay@yahoo.com	Electronic	Electronic	Electronic
1106804		@videotron.ca	Electronic	Electronic	Electronic
1108345		@lachapelle.se	Electronic	Electronic	Electronic
1110653		@hpe.com	Electronic	Electronic	Electronic
1094547		@gmail.com	Electronic	Electronic	Electronic

10

Total of clients: 5. Page 1 of 1

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