D1G1T CLIENT PORTAL

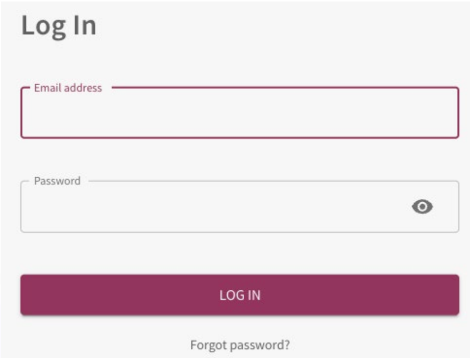
The d1g1t client portal provides access for clients to view their investment portfolios, current holdings, activity, quarterly performance statements and other tax documents. As well, it visualizes portfolio performance analytics and provides a breakdown of the client's current asset allocation.

WEB VERSION

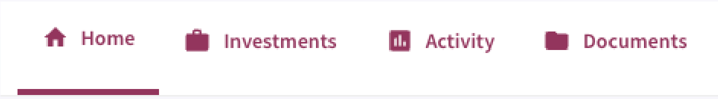
Use the following link to log in to your d1g1t client portal on a webpage.

To begin, enter your email address and password. Then click **LOG IN**. If you forgot your password, click **Forgot Password?** and follow the instructions on screen.

If you require additional help troubleshooting for login, please contact your advisor's office.



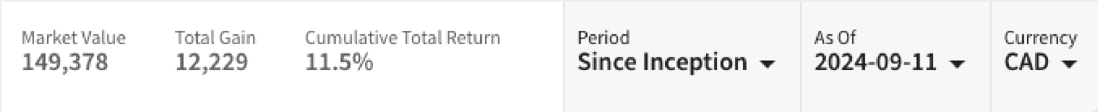
Once you log in, you will see four different tabs on the top of the screen: Home, Investments, Activity and Documents.



HOME

On the home tab, you will see three sections.

The banner on the top provides you with ***metrics and a customization bar***. You have quick access to your current market value, the total gain and the total return on your portfolio.



In terms of customization, you can adjust the following:

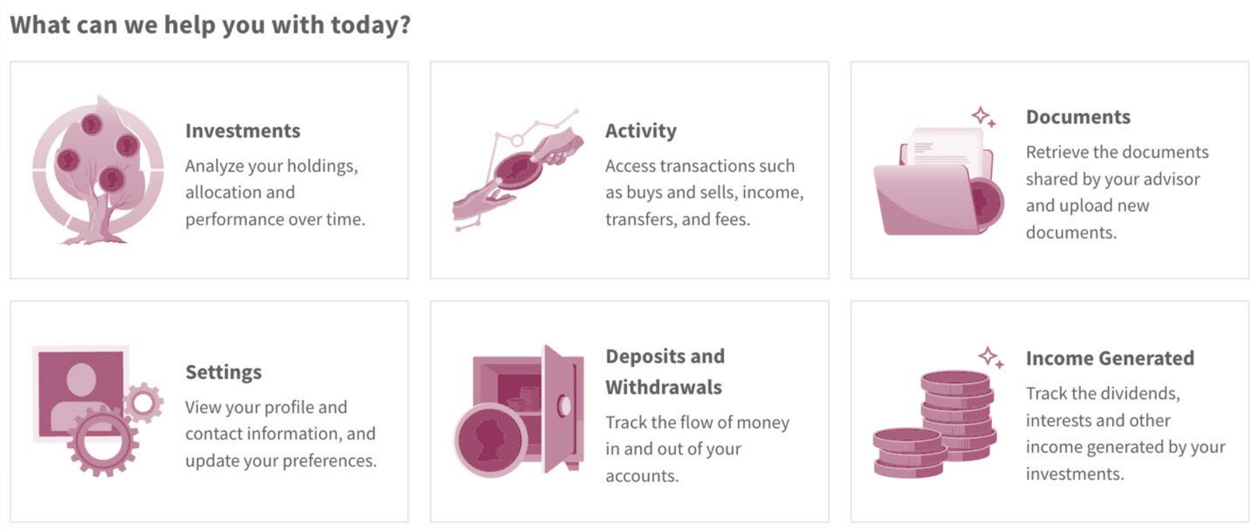
Period – duration to view the metrics on your portal.

As Of – date at which to look at the historical value of your portfolio.

- **Currency** – If an account's base currency is USD, any investments in other currencies (CAD) would be converted into USD for reporting in the client portal.

This ensures that the client can see the total value of their account in one currency without needing to perform their own conversions.

The ***Quick Links*** section offers streamlined access to different areas of the client portal. Designed for simplicity, these links make it easy to navigate and quickly retrieve important information about your assets, allowing you to efficiently manage your portfolio with just a few clicks.



The ***Advisory Team*** section allows you to clearly see who is managing your investments, offering a direct way to contact them whenever you have questions or need guidance. This feature is designed to build trust and keep you closely connected with the professionals responsible for steering your financial strategy, ensuring you always feel supported as they help you work towards your financial goals.

Your Portfolio section offers a comprehensive overview of your investments. This table highlights key account-level information, including:

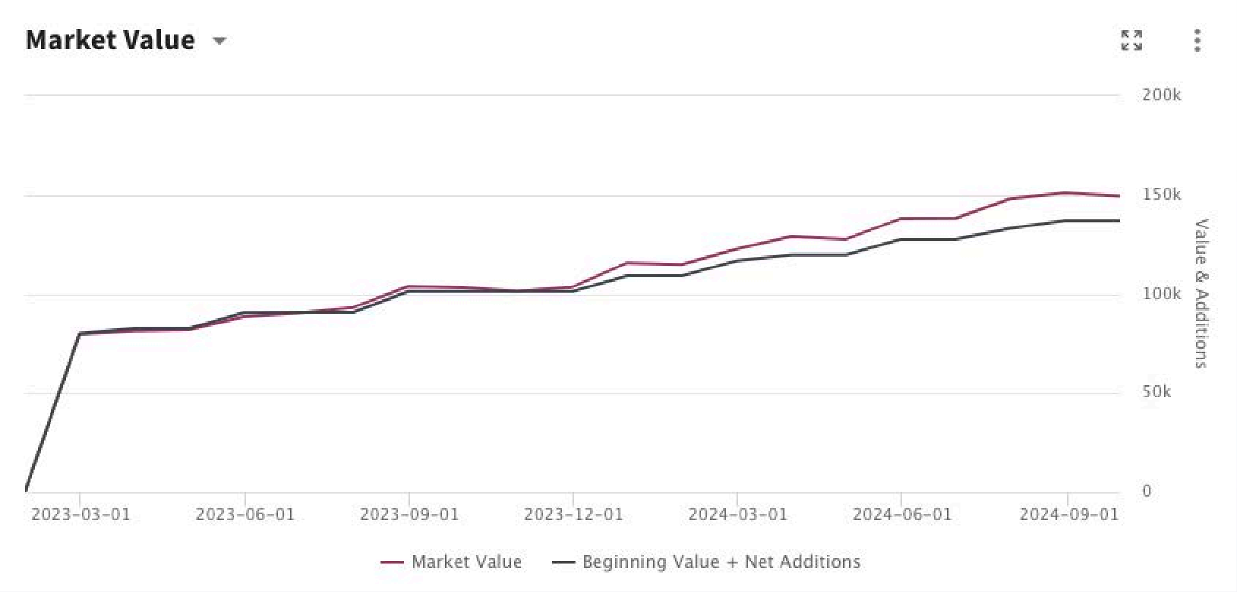
- Name – your unique account ID
- Account Name – distinguishes between individual and joint accounts.
- Account Type – cash, TFSA, RRSP, LIRA, etc.
- Market Value – the value of your account as of yesterday's closing prices.
- Book Value – initial capital paid for the securities held in the account.
- Net Deposits – the difference between deposits and withdrawals since the beginning of the year.
- Total Return – the return your portfolio has generated over three time periods – year to date, one year, and since inception.
- Inception Date – the date your accounts were opened.
- Account Currency – refers to the base currency in which the account is denominated. The account currency allows for consistent tracking of performance.

INVESTMENTS

The investments tab displays detailed information about your holdings, allowing you to view and analyze your individual investments.

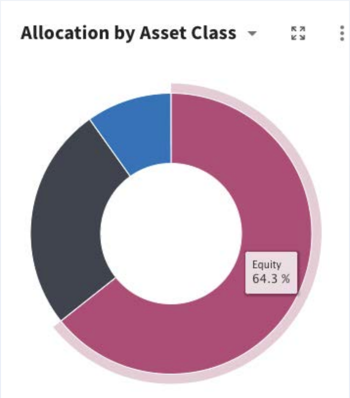
In the top left corner, clients can toggle between a **Market Value** and **Total Return** chart.

To adjust the period on the graph, click on **Period** in the customization bar and select the desired Period.



In the upper right corner, there is a pie chart that shows a portfolio's ***allocation*** by asset class, account, or security.

You may choose your preference by selecting from the drop-down menu.



Across the bottom of the screen, there is a table for **Holdings** with the following view options:

- Total Portfolio Holdings – provides analytics ***by security*** for the whole portfolio.
- Summary of Investments – provides a performance breakdown ***by account***, that can further be broken down by security.

Icons

The **four-arrow icon** allows you to expand the graph for enhanced on-screen visibility, making it easier to view data.

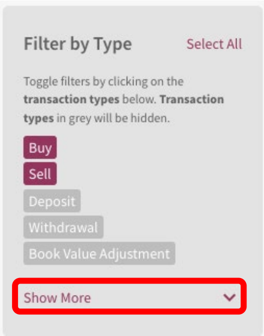
Clicking the **three dots** gives you the option to switch from the graphical display to a tabular format, allowing you to see the data in a clear, structured table.

ACTIVITY

The activity section allows a client to see all their transactions. By default, only buys and sells are selected in the filter type.

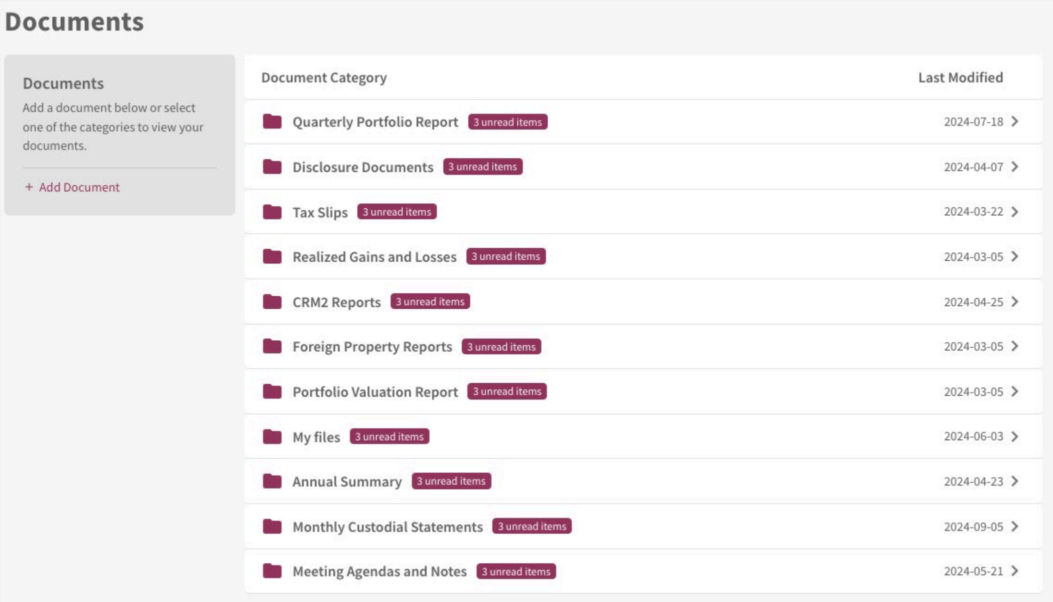
Please note the **Show More** button; there are several transaction types included to choose from. To select additional transaction types, click on the tags – they will turn purple if they are to be included in the list.

Transactions are organized by month. Each transaction is expandable to provide more transaction details. Click on the arrow beside the transaction to view these details.



DOCUMENTS

All documents have been organized using folders. Documents are tagged by category (Tax Slips, Disclosures, etc.) and organized by their applicable time frames (2023, 2024, etc.)



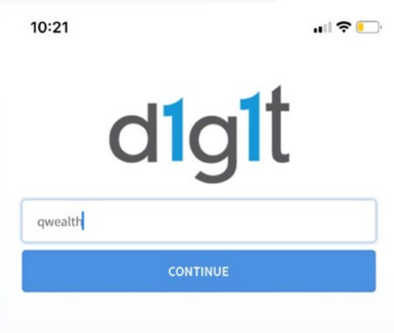
All documents are available for clients to download by clicking on the three dots next to the report title and then clicking **Download**.

For any performance related questions, please contact your Wealth Advisor or Portfolio Manager.

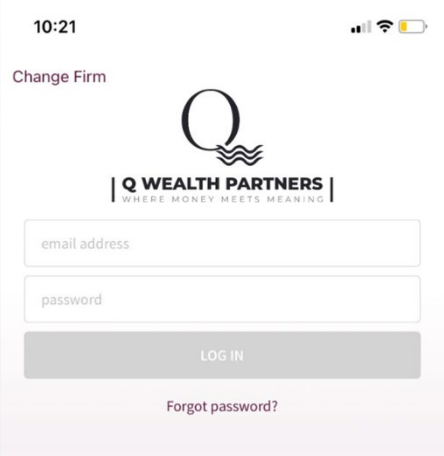
MOBILE APP

The mobile app (d1g1t) can be downloaded on the iOS and Google Play Store.

Upon downloading the app, all clients will need to complete a one-time set up by entering the firm name (**qwealth**). Once entering **qwealth**, select **CONTINUE**.



Entering the firm name will trigger the app to use Q Wealth's branding inside the app as well as change the app icon to Q Wealth.



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