FundEX INVESTMENTS INC. | WEB CONNECT

Client User Guide

Introduction

Welcome to Web Connect! FundEX is pleased to introduce our new secure portal for our investors that will provide online access to your portfolio holdings, investment balances, asset allocations and account activity. This new portal has a much different look and feel from our old Investor website. Web Connect also provides you with the ability to retrieve and view your quarterly account statements online. New industry rules require mutual fund dealers like FundEX to issue mutual fund statements quarterly beginning March 31st, 2012, previously we were only required to issue statements annually. Electronic statements, instead of paper will help reduce costs and environmental impact by providing statements and notifications online. You will be able to access and retrieve statements anywhere, anytime.

The purpose of this guide is to help you navigate through Web Connect. The portal is optimized for use on a variety of different browsers and devices.

Home Page

To login into FundEX Web Connect go to https://client.fundex.com. On the Home Page you will be able to:

1. Sign into FundEX Web Connect
2. Register yourself for access to Web Connect (if it has not already been supplied by your advisor)
3. Reset your password
4. Find a copy of this manual under the Help link
5. Find a link to the old version of the Investor web site

Signing In

Signing in to Web Connect requires you to enter two unique fields:

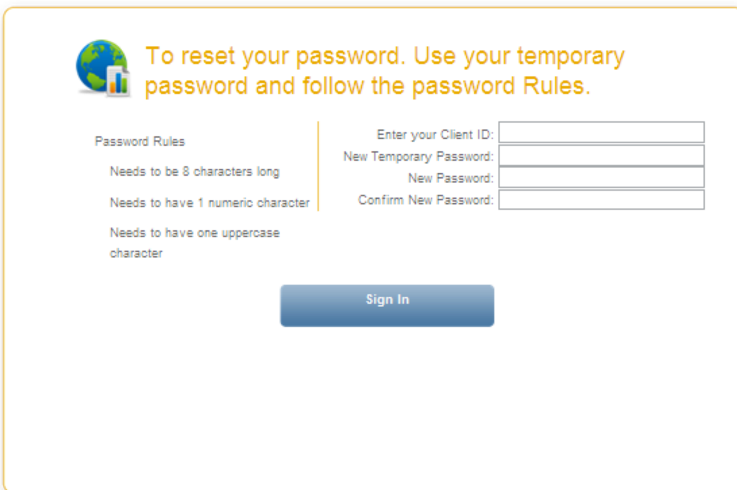
Client ID: This is your unique identifier that has been provided to you by your advisor or during the self-registration process (explained later in this guide).

Password: The secure password chosen by you (or temporarily assigned to you by your advisor).

NOTE: If you currently have access to the existing FundEX Investor website you can continue to use that login id and password for Web Connect.

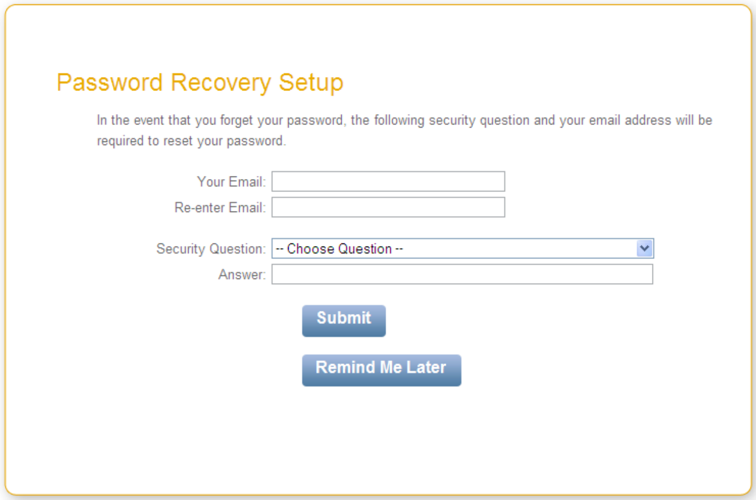
New Password Page

If you are using Web Connect for the first time and were provided with a temporary password from your advisor, you will need to complete these password reset steps. Please note that your password can expire due to inactivity so you would use this page to reset it also.



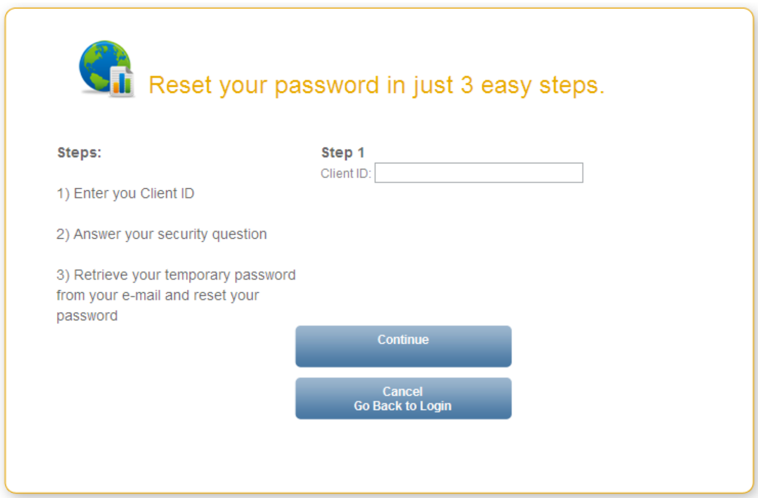
Password Recovery Setup

Upon successful sign in, you will be prompted to provide additional information that will assist you in resetting your password in the future if you needed to. Completing this page will allow to you use the “Forgot your password” function on the home page. If you do not complete this setup, you will have to contact your advisor to reset your password.



Password Reset

The password reset process is started by clicking on "Forgot your password" on the home page.

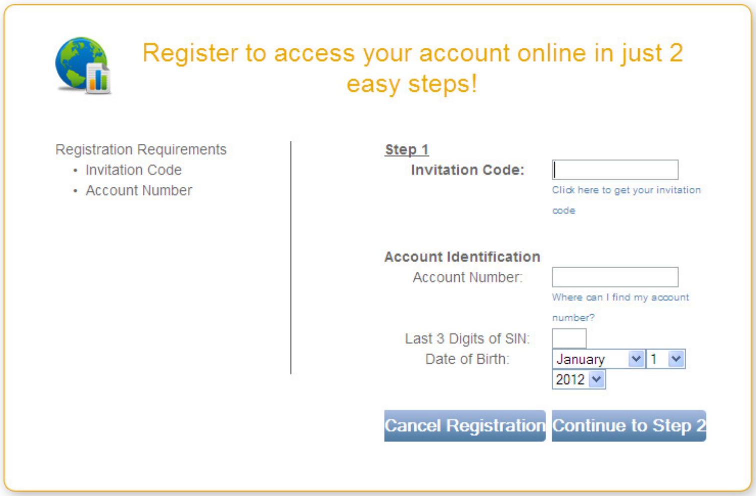


You will then be asked to enter your Client ID and the answer to the security question entered in the password recovery setup. Once complete, you will receive an email with a temporary password which will need to be reset.

If you have not completed the password recovery setup, you will need to contact your advisor's office to reset your password to Web Connect.

Web Connect Self-Registration

You can register for a Web Connect login id by using the self-registration setup. To begin click on the "Register" button on the home page.

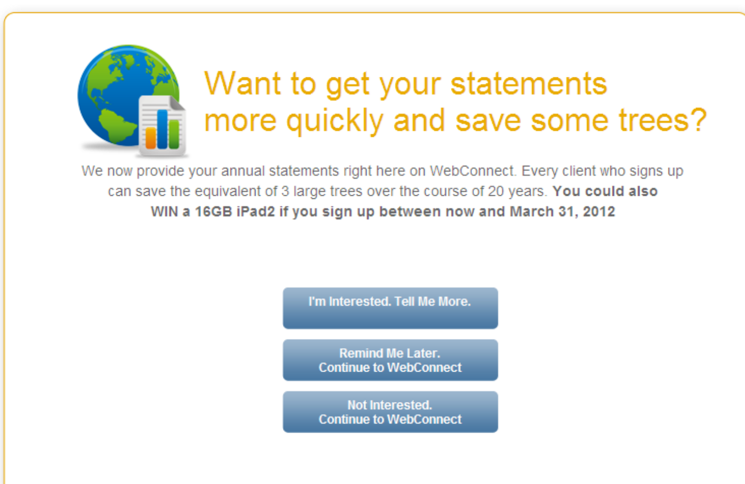


If you do not wish to use self-registration, you can contact your advisor's office to get setup.

NOTE: For corporate ownerships, you cannot use self-registration because it requires the last three digits of a Social Insurance Number. You must contact your advisor's office to get setup for corporate ownerships.

E-Delivery Enrolment Setup

Upon logging into Web Connect, you will be presented with a campaign page for e-delivery enrolment

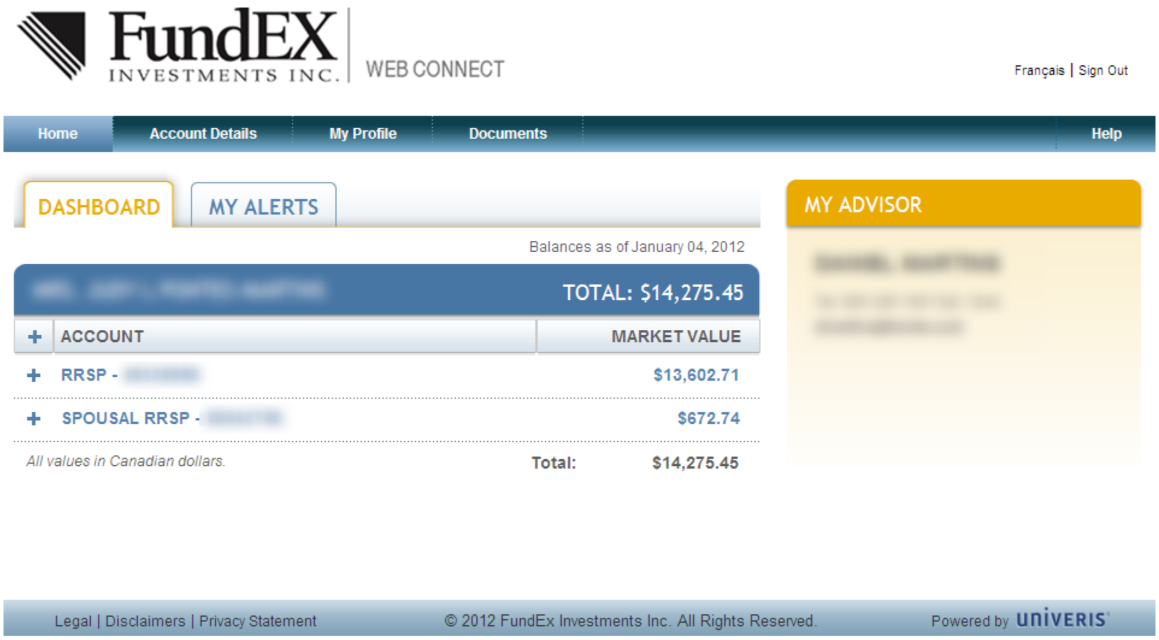


Follow the screen options to proceed with enrolment and use campaign code FUN2012

NOTE: You can change your delivery preferences at any time once inside Web Connect under My Profile→Preferences (explained later in this guide).

Web Connect Navigation

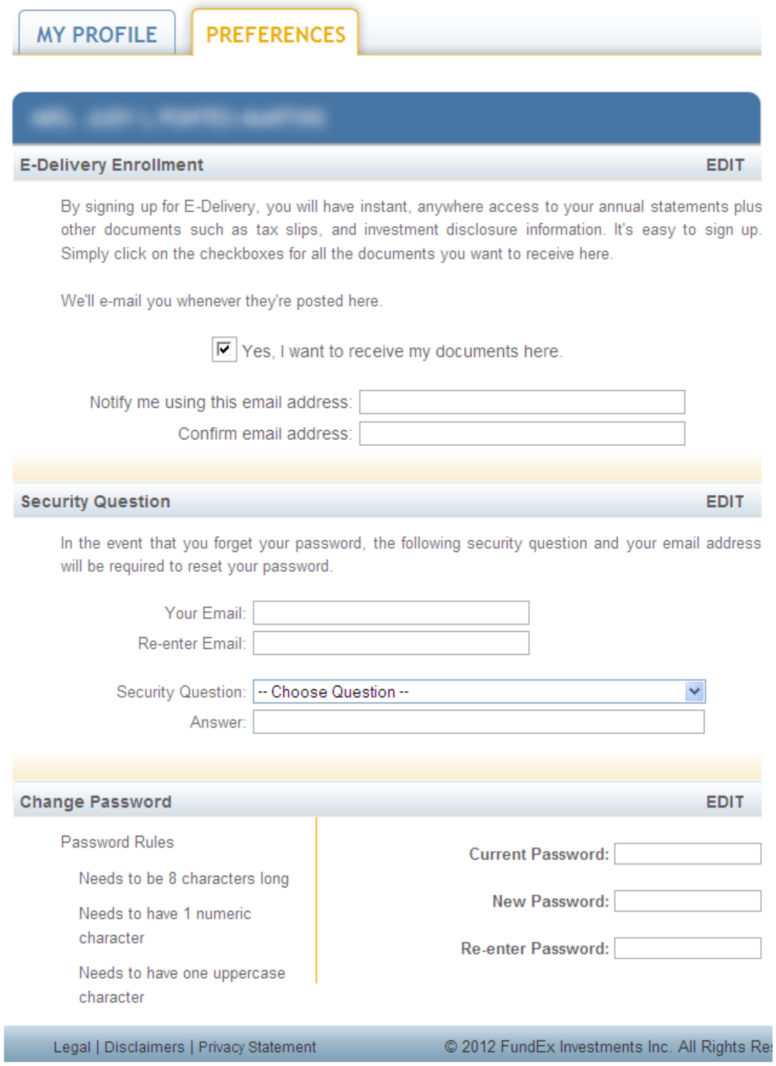
Once logged into WebConnect, navigating the site is easy.



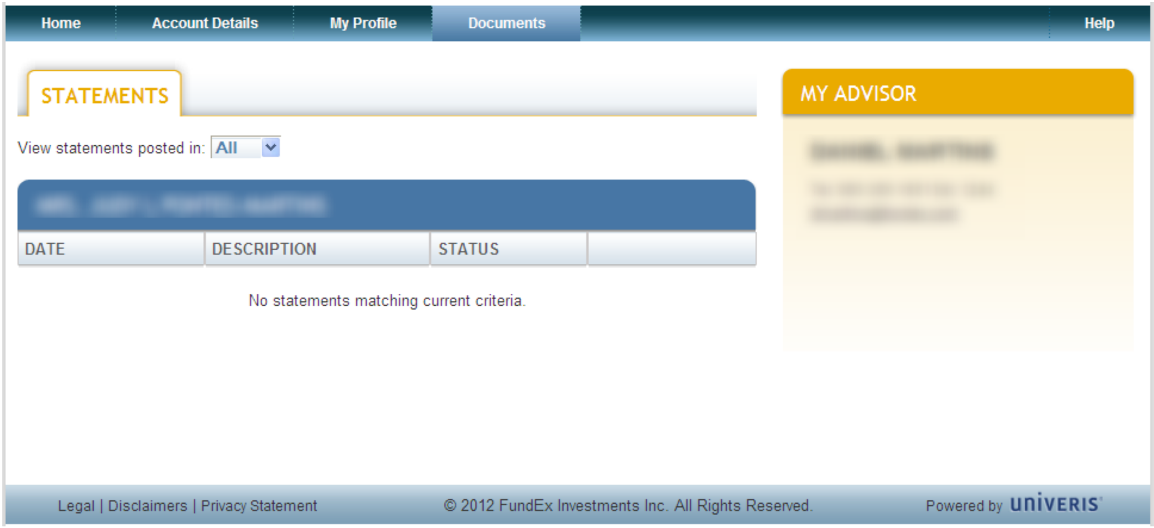
Click on "Help" in the top right corner for assistance with finding answers to some common questions.

The **My Profile** section contains your contact information on file with FundEX Investments Inc. It is also where your **Preferences** are kept for things like E-Delivery enrolment, Password Recovery and changing your password.

The **My Alerts** tab will display any new notifications (for instance, when a document is posted or when email validation is required).



The **Documents** section will contain any statements that have been generated for you to view.



We hope that you find Web Connect useful and we plan on expanding its functionality over the coming months. In the meantime if you wish to continue to use the old site, there is a link to it on the Web Connect login page. If you have any questions around how to register for or how to use Web Connect we ask that you please contact you Advisor.