



Client Portal Login Instructions

Aligned Capital Partners Inc. (ACPI) is pleased to announce a new Client Portal to coincide with our change in custodian from National Bank Independent Network (NBIN) to CI Investment Services Inc. (CIIS).

In April, we announced that all ACPI client should expect a change in their online account access away from the current My Portfolio + system to a new and improved Client Portal. Please find instructions below to navigate the new Client Portal and view your client accounts.

Before getting started, you will need:

1. 5 minutes of dedicated time to complete the login process
 2. Access to your email address
 3. Access to reliable and safe internet
 4. Your date of birth and SIN number
-

Process

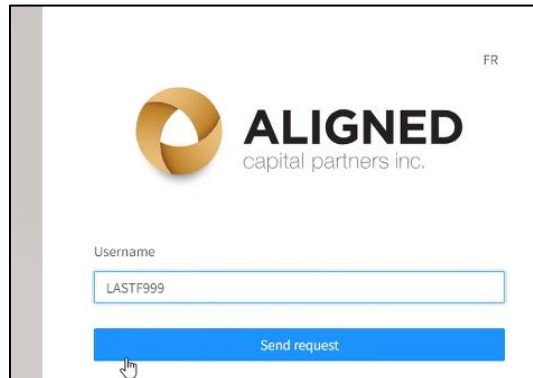
Step 1: You will receive an email from your Advisor Branch with a login link

Step 2: Select the link sent to your email address once you are ready to proceed
(clientportal.aligned.digital/register)

Step 3: Enter your unique User ID

Format:

- (Last name)(First name initial)(Last 3 digits of SIN)
- All capital letters
- For example John Doe with a SIN number of 123-456-789 would enter DOEJ789



The screenshot shows the ALIGNED registration page. At the top, there is the ALIGNED logo and the text "capital partners inc." with a small "FR" in the top right corner. Below the logo is a "Username" label and a text input field containing "LASTF999". A blue "Send request" button is positioned below the input field, with a mouse cursor hovering over it.

Note:

- If you have a hyphen in your name, please omit this from your User ID
Ex) John Doe-Smith with a SIN number of 123-456-789 would enter DOESMITHJ789
 - If you have an apostrophe in your name, please omit this from your User ID
Ex) John D'Smith with a SIN number of 123-456-789 would enter DSMITHJ789
 - If you have a period in your name, please omit this from your User ID
Ex) John St. Doe with a SIN number of 123-456-789 would enter STDOEJ789
 - If you have a space in your name, please omit this from your User ID
Ex) John Doe Smith with a SIN number of 123-456-789 would enter DOESMITHJ789
-

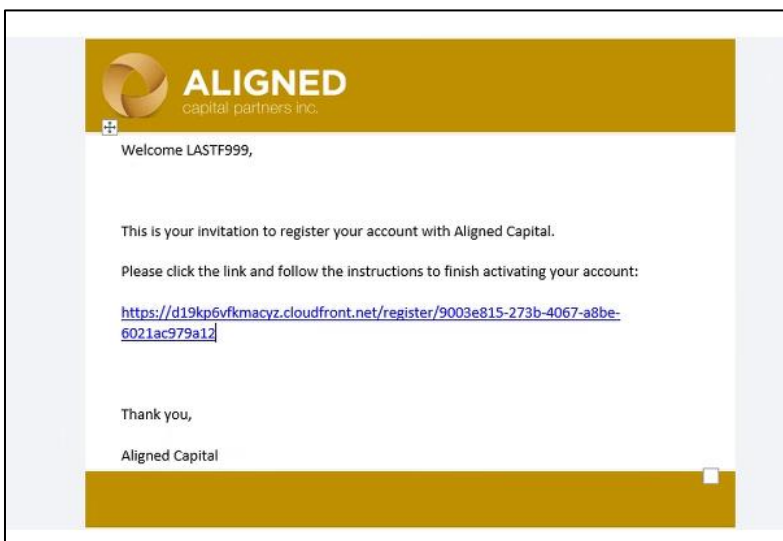


Step 4: You will receive activation email from gateway@alignedcapitalpartners.com

Note:

- The activation link is valid for 30 minutes once sent to your inbox. If more than 30 minutes has passed, please go back to Step 1.

Step 5: Select the link in the activation email



Step 6: Enter your date of birth and postal code to bypass the multi-factor security check before selecting "Register"

Date of Birth

Postal Code





Step 7: Enter your desired password noting the password criteria below

Enter Password

Confirm Password

- ✓ A lowercase character
- ✓ A symbol
- ✓ At least 8 characters
- ✓ An uppercase character
- ✓ A number
- ✓ Passwords match

Submit

Step 8: Once you select “Submit”, you will be taken to the main login page to enter your new User ID and password

Note: Save this link for future logins (clientportal.aligned.digital)

Login

Password

Login



Step 9: Set your security questions and accept the Terms and Conditions

To help secure your account please choose your security questions, and enter your responses.

Question

Your father's middle name?

Advisor

Question

Your mother's middle name?

Advisor

18. Acknowledgement

You acknowledge having read the Terms and Conditions of Use of the Online Services.

Yes, I agree to abide by the terms and conditions set out in the User Agreement.

