

Online Account Access through Georgijev Financial Group and InvestorNet

Step 1

www.GeorgijevFinancial.ca and click on “Investor Login”

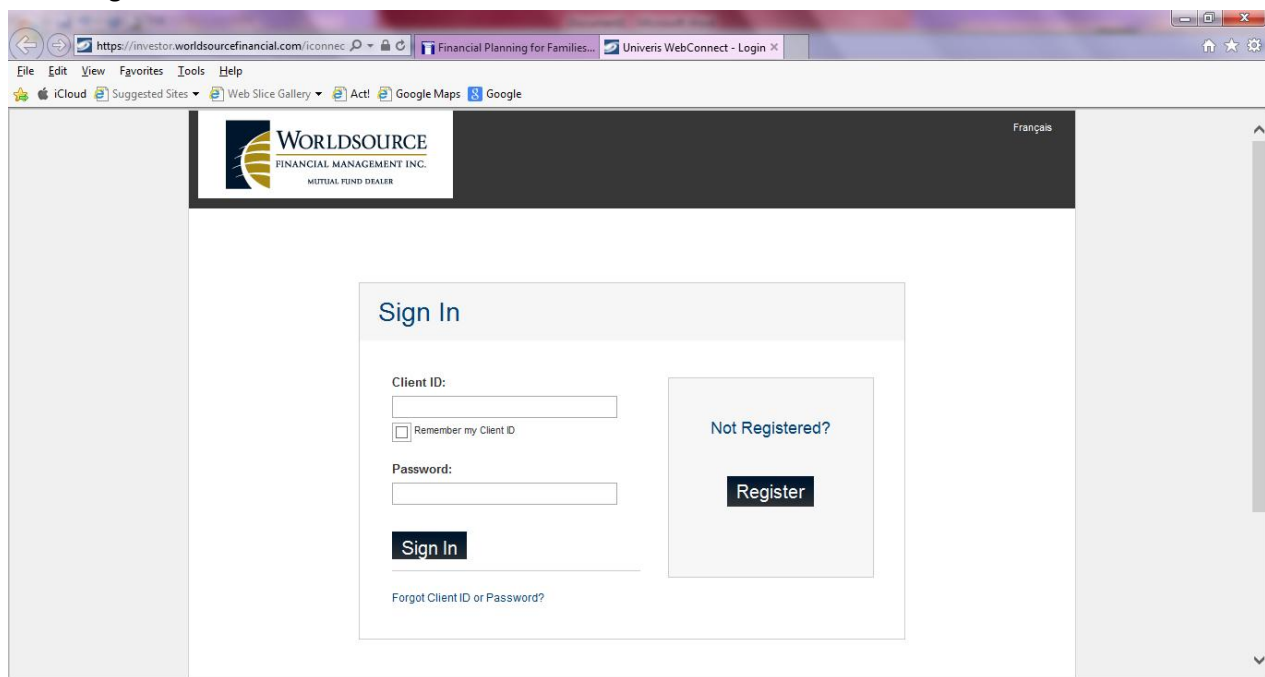


The screenshot shows the homepage of Georgijev Financial Group. The browser address bar displays <http://www.georgijevfinancial.ca/>. The page features the company logo on the left, contact information (info@georgijevfinancial.ca, 519-472-0055) in the center, and the Worldsource Financial Management Inc. logo on the right. A central banner reads "Helping You Achieve and Protect Your Financial Wealth & Security" with a photo of a diverse group of professionals. A navigation menu includes Home, About Us, How We Help, Resources, Testimonials, Blog, Investor Login, and Contact Us. Below the menu are three service highlights: "Helping Families" (raising a family), "Helping Businesses" (minimizing taxes), and "Helping Retirees" (retirement planning).

Step 2

The *InvestorNet* login page will open in a separate window

Click “Register”



The screenshot shows the InvestorNet login page. The browser address bar displays <https://investor.worldsourcefinancial.com/iconnect/u/login.page>. The page features the Worldsource Financial Management Inc. logo and a "Français" link. The main content area is titled "Sign In" and contains a form with fields for "Client ID:" and "Password:". A "Remember my Client ID" checkbox is located below the Client ID field. A "Sign In" button is positioned below the password field. To the right of the form is a "Not Registered?" section with a "Register" button. A "Forgot Client ID or Password?" link is located at the bottom of the form.

Step 3

Invitation Code: ONLINE

Type in any one of your account numbers (all your accounts will automatically link once you complete your registration)

The last 3 digits of your SIN

Date of Birth

The screenshot shows a web browser window with the URL <https://investor.worldsourcefinancial.com/iconnect>. The page title is "Financial Planning for Families... Univeris WebConnect - Sig...". The main content area features a registration form titled "Register to access your account online in just 2 easy steps!". On the left, under "Registration Requirements", there is a list: Invitation Code, Account Number, Last 3 Digits of SIN, and Date of Birth. The form fields are: "Invitation Code" with the value "ONLINE" and a small "x" icon; "Account Number" with a text input field and a link "Where can I find my account number?"; "Last 3 Digits of SIN" with a text input field containing "###"; and "Date of Birth" with dropdown menus for "January", "1", and "2013". At the bottom are two buttons: "Cancel Registration" and "Continue to Step 2".

Step 4:

Set and re-enter a Password and click on "I agree"

Click "Complete Registration"

The screenshot shows the same web browser window, now at "Step 2" of the registration process. The main heading is "Access your account securely anywhere, anytime, from your desktop, laptop or tablet device.". On the left, under "Password Rules", there is a list: Minimum 8 Characters, Contains Alpha and Numeric Characters, and Alpha Characters may be Upper and Lower Case. The form fields are: "Set Password" with "New Password:" and "Re-enter Password:" text input fields; and "Confirm Agreement" with a scrollable text area containing the text: "Receipt of all quarterly Worldsource Financial Management ('Worldsource') Client Statements. These statements will be posted on a secure Client Access website. Worldsource Financial". Below the text area is a checkbox labeled "I agree". At the bottom are two buttons: "Cancel Registration" and "Complete Registration".

Step 5:

Thank You for Registering page will appear.

Write down your Client ID as you will need it to Login in the future.

Click on “Go to Home Page”

Step 6:

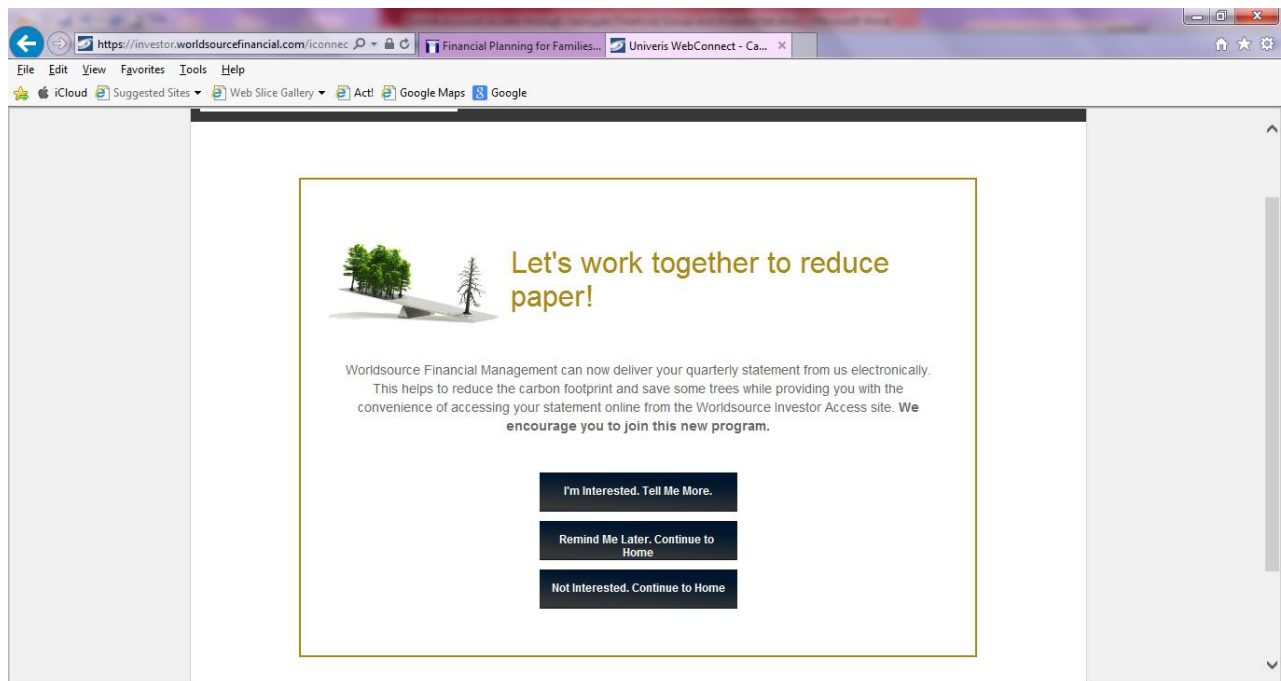
Password Recovery Setup - Enter and Confirm your Email Address and setup your Security Question

Step 7:

To reduce paper and receive notifications to view your quarterly statements online choose

“I’m Interested. Tell Me More”

Click on “Enroll” and Confirm the Email Address where the notifications will be sent.



Step 8:

An email verification will be sent to the email address you submitted.

Click on the link in the email to validate the email address and complete your registration.

YOU'RE DONE!

All your GFG accounts (including joint plans) will be automatically linked when you register. Now you can login any time, 24hr a day, 7 days a week by visiting www.GeorgijevFinancial.ca

Be sure to bookmark our site!