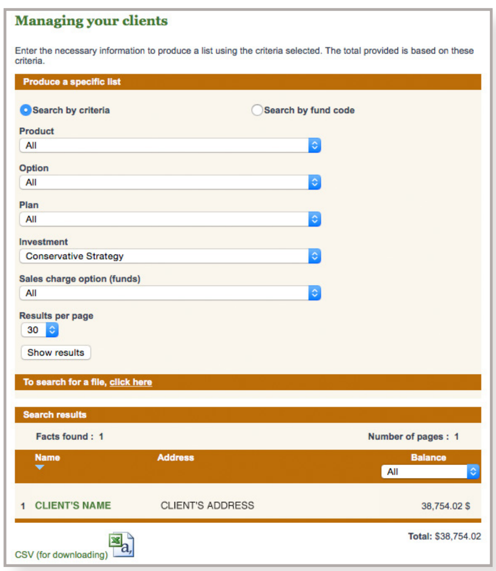
SSQ Financial Group
Values in the right place

OUR ONLINE SERVICES: MAKING YOUR LIFE EASIER!

Are you familiar with all that our Advisor secure website has to offer?

In addition to the **SSQ Guaranteed Investment Funds (GIF) returns, interest rates** on our Guaranteed Interest Accounts (GIAs) and the **various documents and forms** available online, **a secure access to our site provides a host of useful services**.

A) PRODUCE CLIENT LISTS



You can generate a list of your clients using the criteria of your choice by clicking on *Specific list* under the *Managing your clients* menu.

For example, you can ask to see the list of your clients who have invested in the SSQ Conservative Strategy GIF, or the list of your clients who hold the Enhanced guarantee, or the list of your clients who have invested in funds with the back-load sales charge option, or a combination of any of the above.

In all instances, the balance of funds related to your search criteria is indicated.

If you do not choose specific criteria and simply click on *Show results*, you will obtain the complete list of your clients and their total assets.

A quick and easy way to get information on your clientele and your assets with us!

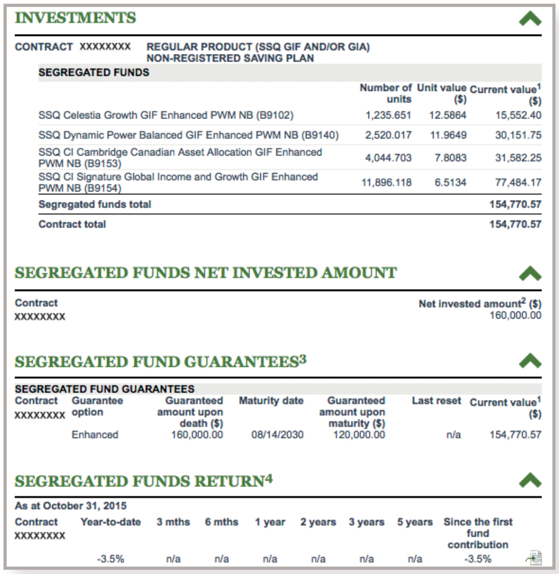
B) ACCESS YOUR CLIENTS' FILES

You can also search for a specific client by clicking on *Search files*. By clicking on the name of your client, you will have access to all of the information we have on file for that client. By clicking on *Past Statements/Reports*, you can access various documents that have been sent to your client over time, such as statements of investment, tax slips, etc.

If you complete the investor's profile with your client, available via access to the client's file, the results will be saved and you can refer to them later.

One-stop access to all your client information!

C) CONSULT THE STATUS OF THE PORTFOLIO AND THE TRANSACTION STATEMENT AS OF THE CURRENT DATE



INVESTMENTS

CONTRACT XXXXXXXX REGULAR PRODUCT (SSQ GIF AND/OR GIA)
NON-REGISTERED SAVING PLAN

SEGREGATED FUNDS

	Number of units	Unit value ($)	Current value[1] ($)
SSQ Celestia Growth GIF Enhanced PWM NB (B9102)	1,235.651	12.5864	15,552.40
SSQ Dynamic Power Balanced GIF Enhanced PWM NB (B9140)	2,520.017	11.9649	30,151.75
SSQ CI Cambridge Canadian Asset Allocation GIF Enhanced PWM NB (B9153)	4,044.703	7.8083	31,582.25
SSQ CI Signature Global Income and Growth GIF Enhanced PWM NB (B9154)	11,896.118	6.5134	77,484.17
Segregated funds total			**154,770.57**
Contract total			**154,770.57**

SEGREGATED FUNDS NET INVESTED AMOUNT

Contract	Net invested amount[2] ($)
XXXXXXXX	160,000.00

SEGREGATED FUND GUARANTEES[3]

SEGREGATED FUND GUARANTEES

Contract	Guarantee option	Guaranteed amount upon death ($)	Maturity date	Guaranteed amount upon maturity ($)	Last reset	Current value[1] ($)
XXXXXXXX						
	Enhanced	160,000.00	08/14/2030	120,000.00	n/a	154,770.57

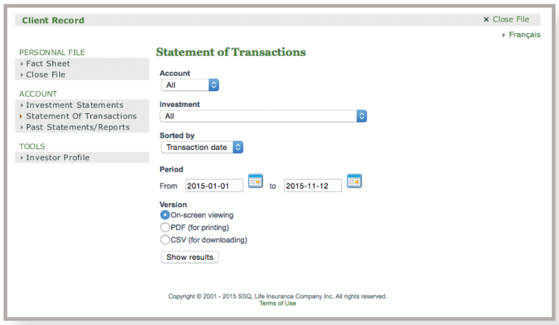
SEGREGATED FUNDS RETURN[4]

As at October 31, 2015

Contract	Year-to-date	3 mths	6 mths	1 year	2 years	3 years	5 years	Since the first fund contribution
XXXXXXXX								
	-3.5%	n/a	n/a	n/a	n/a	n/a	n/a	-3.5%

Via your client's file, you can access his/her portfolio which is updated daily.

The status of the portfolio includes, among others, the list of investment vehicles held and their value on the current date, the net amount invested in segregated funds since enrolment, the guaranteed amounts and personal performance of segregated funds held by the client at the end of the previous month, including returns since the first fund contribution.



Client Record

× Close File

› Français

PERSONNAL FILE
› Fact Sheet
› Close File

ACCOUNT
› Investment Statements
› Statement Of Transactions
› Past Statements/Reports

TOOLS
› Investor Profile

Statement of Transactions

Account: All

Investment: All

Sorted by: Transaction date

Period: From 2015-01-01 to 2015-11-12

Version
- On-screen viewing
- PDF (for printing)
- CSV (for downloading)

Show results

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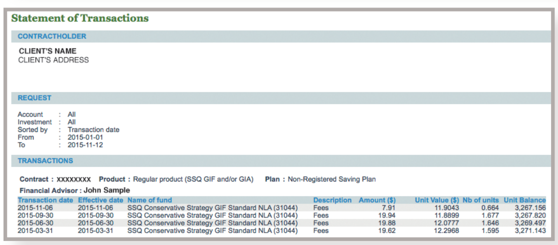

Statement of Transactions

CONTRACTHOLDER

CLIENT'S NAME
CLIENT'S ADDRESS

REQUEST

Account : All
Investment : All
Sorted by : Transaction date
From : 2015-01-01
To : 2015-11-12

TRANSACTIONS

Contract : XXXXXXXX **Product :** Regular product (SSQ GIF and/or GIA) **Plan :** Non-Registered Saving Plan

Financial Advisor : John Sample

Transaction date	Effective date	Name of fund	Description	Amount ($)	Unit Value ($)	Nb of units	Unit Balance
2015-11-06	2015-11-06	SSQ Conservative Strategy GIF Standard NLA (31044)	Fees	7.91	11.9043	0.664	3,267.156
2015-09-30	2015-09-30	SSQ Conservative Strategy GIF Standard NLA (31044)	Fees	19.94	11.8899	1.677	3,267.820
2015-06-30	2015-06-30	SSQ Conservative Strategy GIF Standard NLA (31044)	Fees	19.88	12.0777	1.646	3,269.497
2015-03-31	2015-03-31	SSQ Conservative Strategy GIF Standard NLA (31044)	Fees	19.62	12.2968	1.595	3,271.143

Also by way of the client's file, you can download the list of transactions in the format of your choice, for the investment vehicle and period selected. This feature allows you to monitor the transactions whenever you want, without any hassles!

Your clients also have access to their portfolio and online transaction statements, making it easy for them to obtain information whenever they need to.

D) OTHER REPORTS AND TOOLS

The following tools and reports are also available:

- commissions reports (detailed, summary or cumulative, for the period and in the format selected)
- list of maturing GIAs
- annuity quote and RRIF or locked-in RRIF payment calculators
- consultation of your banking information and your remuneration schedule by product

ssq.ca

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