



## WORLDSOURCE VIEW

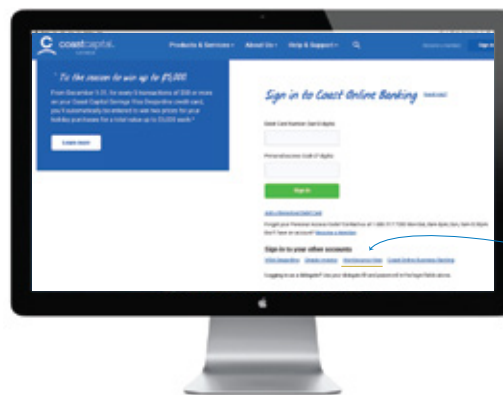
Welcome to Worldsource View, a joint Coast Capital Savings / Worldsource Financial Management tool that allows members to view and monitor investments online, anytime, anywhere.

This quick guide will assist you during your first login to the new site and outline where to access your account information, including market and book values, holdings, account activity, gain/loss information and documents such as statements, confirmations and tax slips.

## GET STARTED

### 1. LOGIN TO WORLDSOURCE VIEW

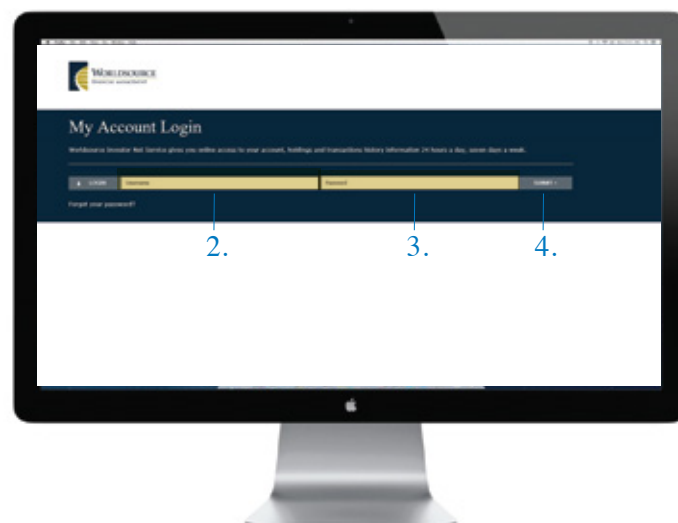
CLICK ON WORLDSOURCE VIEW  
LOCATED AT THE BOTTOM OF  
THE COAST CAPITAL SAVINGS  
MEMBER SIGN IN PAGE  
([coastcapitalsavings.com/OnlineBanking](http://coastcapitalsavings.com/OnlineBanking))



1. Investor Login

### 2. USERNAME

ENTER YOUR  
EXISTING USERNAME  
(user names did not change  
with the relaunch of Worldsource View)



### 3. PASSWORD

ENTER YOUR  
TEMPORARY PASSWORD

### 4. CLICK SUBMIT

### 5. SECURITY QUESTIONS

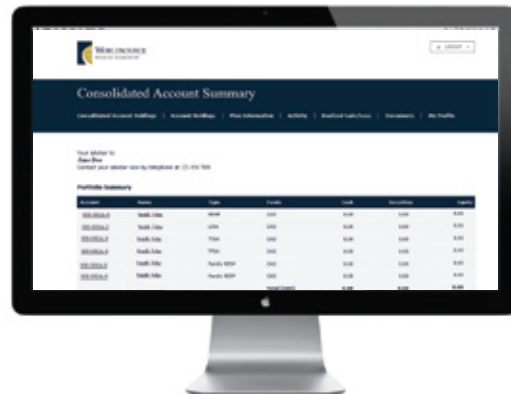
You will be directed to the Security Questions page to establish verification questions used to confirm your identity in the future. Complete and select update. A confirmation will be sent to your email address on file.

### 6. CHANGE PASSWORD

We encourage you to set up a new password accessible under the My Profile page.

NOTE: If you have not received the letter containing your temporary password, or you experience any issues logging in, please contact **WFM's Advisor Relations team at 905.940.0070 /800.341.1013 for assistance.**

## WORLDSOURCE VIEW HIGHLIGHTS



### CONSOLIDATED ACCOUNT HOLDINGS PAGE

Provides an overview of your account(s)

### ACCOUNT HOLDINGS PAGE

Outlines the mix of products within your account(s)

### PLAN INFORMATION PAGE

Features information on your registered plan(s), such as beneficiaries and contributions

### ACTIVITY PAGE

Allows you to monitor your transactions over a specified period: 30 days, 90 days, a specific month in the current year, year-to-date and all transactions

### REALIZED GAIN/LOSS PAGE - COMING SOON

Allows you to view realized gain/loss information for securities you have sold in the past

### DOCUMENTS PAGE

Displays electronic records such as statements, tax receipts (available for the 2018 tax year) and trade confirmations

### MY PROFILE PAGE

Lets you manage your personal profile, including password features, electronic preferences and account nicknames allowing you to set meaningful labels for your accounts