

# How to set up your Advisor Manulife ID

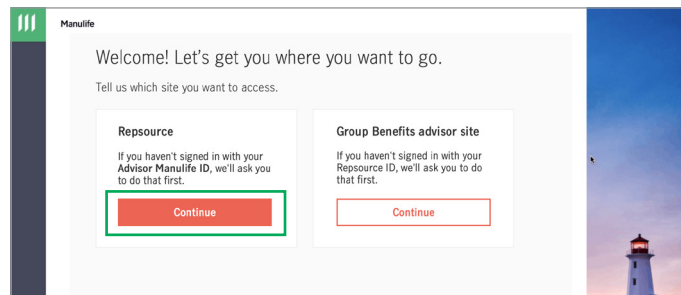
The Advisor Manulife ID is a single, secure username and password for accessing Manulife products and services. It replaces any previous credentials with one ID and helps simplify your online business interactions with us. **Follow the steps below to set up your Advisor Manulife ID.**

**Once you set up your Advisor Manulife ID, sign in and connect your new or existing Repsource profile.**

 **If you already have one, sign in and go to page 4 for instructions to connect Repsource profile to your ID.**

## Setting up your Advisor Manulife ID

1. Go to [repsource.ca](https://repsource.ca) Click **Continue** to register for Advisor Manulife ID.



With Advisor  
Manulife ID,  
you get:



All-around  
security



One username  
and password



Simplified online  
experience

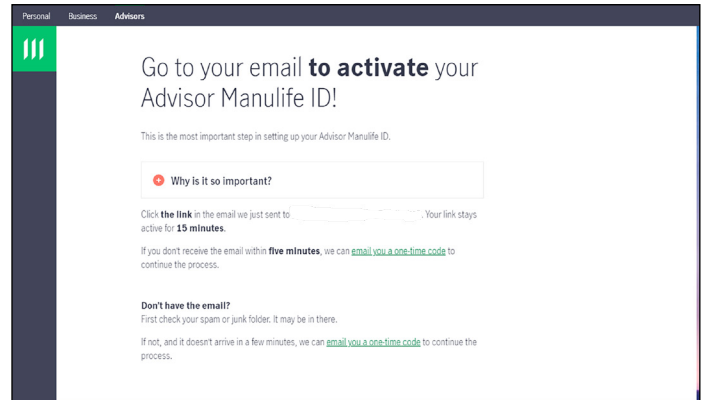
2. Enter your **name**, **date of birth**, and **email**. Pick a unique **username** and **password**.

**Note:** The **Show more** links provide tips on the different steps.

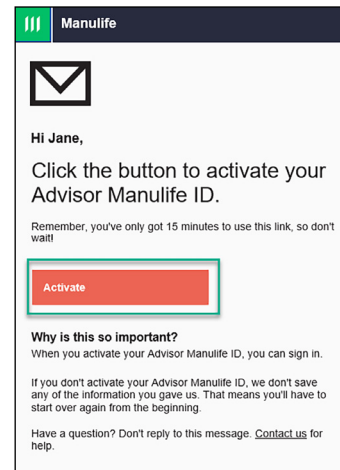
Click **Continue**

The screenshot shows the Manulife registration page. At the top, there are tabs for 'Personal', 'Business', and 'Advisors'. The page title is 'Set up your Advisor Manulife ID'. Below the title, there is a sub-header 'Let's set up your single, secure ID for everything Manulife.' followed by a link 'Learn more about your Manulife ID'. The form consists of several sections: 'Please fill out everything.' with fields for 'First name' and 'Last name'; 'Date of birth' with fields for 'Day (dd)', 'Month' (a dropdown menu), and 'Year (yyyy)'; 'Email' field; 'Language for email' with radio buttons for 'English' (selected) and 'French'; a 'Why are we asking for this information?' link; 'Pick a username and password' section with 'Username' field, a 'Do you have to use your email as a username?' link, 'Password' field with a 'SHOW' button, a 'Password tip' link, and 'Re-enter your password' field with a 'SHOW' button. At the bottom of the form, there is a red 'Continue' button highlighted with a green box. Below the form, there is a link 'Already have an Advisor Manulife ID?' and a red 'Sign in instead' button.

3. You'll receive an activation email to continue setting up your Advisor Manulife ID.



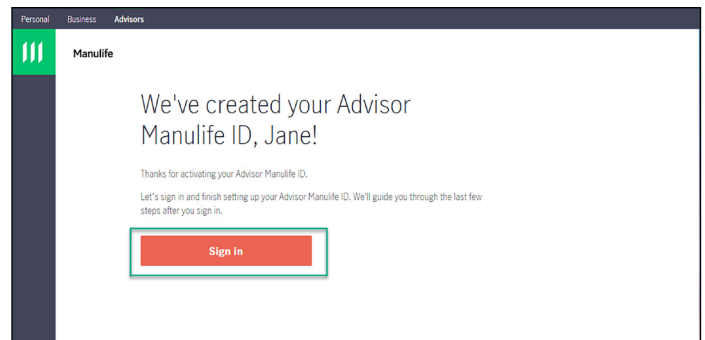
**Important:** Click the **Activate** button in the email to activate your Advisor Manulife ID.



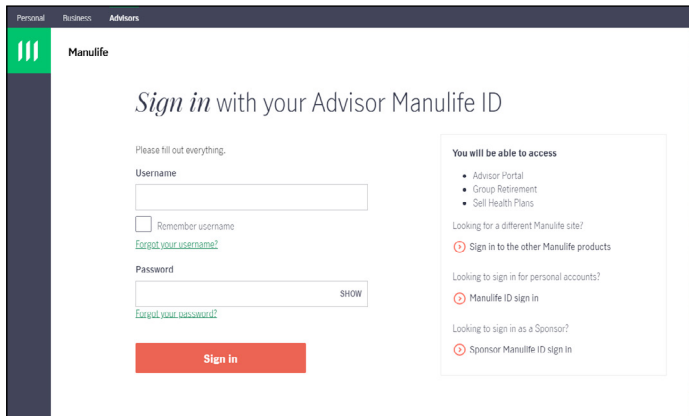
**Note:** After the activation email arrives in your inbox, you only have 15 minutes to activate your ID. So, do it right away!

4. Once you click **Activate**, the below message will appear to confirm your Advisor Manulife ID has been activated.

Click **Sign in**.



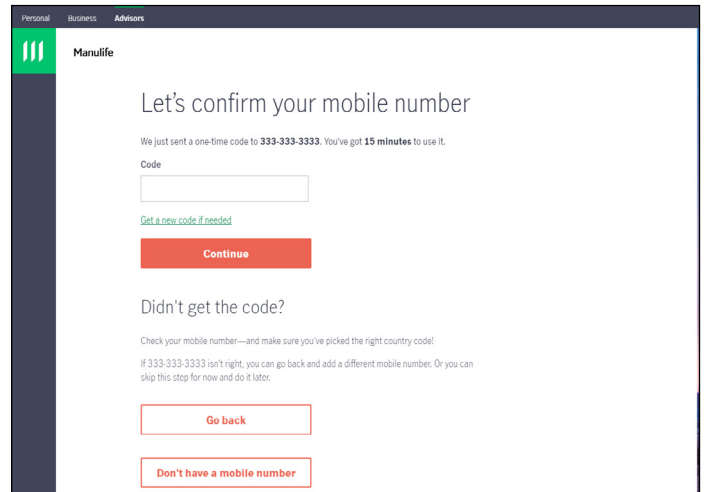
5. Enter your new Advisor Manulife ID username and password and click **Sign in**.



7. A verification text with a code will be sent to your mobile number. This code will be required to proceed.

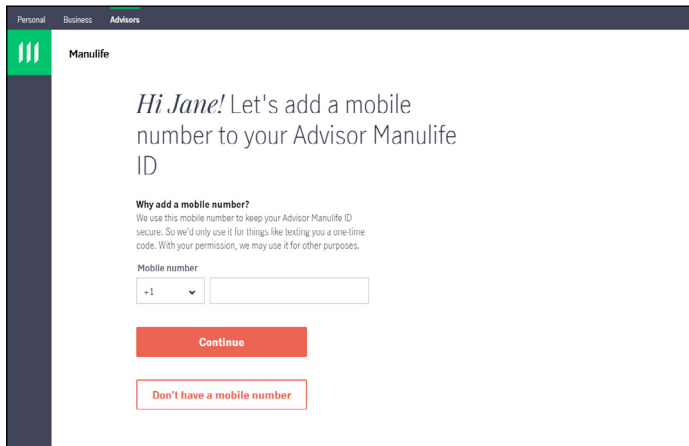
Enter the code and click **Continue**.

**Note:** After the verification text arrives, you only have 15 minutes to use the code. So, do it right away!

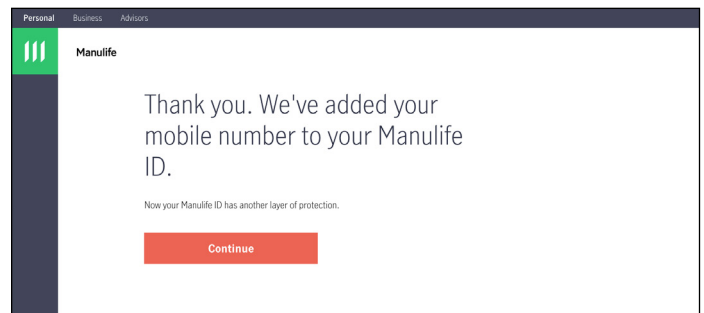


## Add a mobile number

6. Add your mobile number to keep your Advisor Manulife ID secure and click **Continue**.



8. Once you click **Continue**, the screen below will appear to confirm that your mobile number has been added. Click **Continue** to connect your Advisor Manulife ID to your Repsource profile.



Your Advisor Manulife ID is created! Now, let's connect your existing Repsource profile.

# Connecting your Advisor Manulife ID to your existing Repsource profile



**Please note:** Advisors must complete this task before an assistant or associate to ensure their access can be properly linked to yours.

Once you've created your Advisor Manulife ID, you'll need to connect it to your Repsource profile. You'll only need to connect your account once.

1. Go to Repsource.ca, Click on 'Continue'.

2. Sign in with your Advisor Manulife ID.

3. Click Yes you have a Repsource account.

4. Enter your **Repsource** username and email address associated with your profile.

Note: You must have access to the email address associated with your Repsource profile.

5. Click **Continue**.

6. You'll receive an activation email to connect your Advisor Manulife ID.

Click the **Activate** button in the email to connect your existing Repsource profile with your Advisor Manulife ID.

Note: After the activation email arrives in your inbox, you only have 4 hours to activate your ID. So, do it right away!

7. Once you click Activate, you'll see a message confirming your account has been verified.



**Your Advisor Manulife ID is now connected to your existing Repsource profile!**

# Connecting your Advisor Manulife ID to a new Repsource profile

If you've never signed into Repsource and require access to your clients' data and our online tools with Manulife Investment Management, you'll need to register for Repsource and follow the below steps.

If you have already created your Advisor Manulife ID, sign into Repsource. You should be prompted with the screen below.

1. Select **No**, you do not have a Repsource account then click **Continue**.

The screenshot shows the Manulife registration interface. At the top left is the Manulife logo. The main heading is "Let's get you connected *Ryan*". Below this, a message states: "Now we need to connect your Repsource account to your Advisor Portal ID. If you do not have an existing Repsource account, we will go through a few more steps to register you for Advisor Portal." A question asks, "Do you have an active Repsource account?" with two radio button options: "Yes" and "No". The "No" option is selected. Below the question, it says "Enter your Repsource account information so that we can transfer your profile." There are two input fields: "Repsource username" and "Email" (with a help icon). At the bottom is a large red "Continue" button.

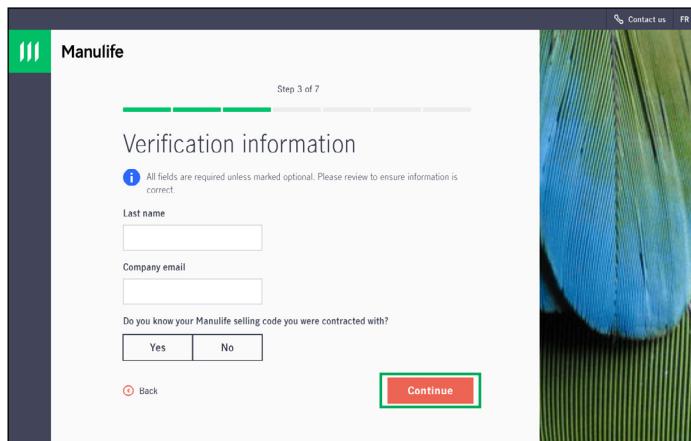
2. Read the legal agreement. Check the box to indicate that you've read and agree to the Terms & Conditions, then click **Continue**.

The screenshot shows the "Legal agreement" screen, labeled "Step 1 of 5". It contains a paragraph of legal text: "Please carefully read this notice before you use this web site. If you do not agree with the following conditions, please exit the site. By registering for the use of Advisor Portal, you are entering into a contract with Manulife Financial and agreeing to the following:" Below the text is a list of terms with radio buttons: "Site content", "Confidentiality", "Use of this site", "Security", "Privacy", "Trademarks", "Governing laws", and "Agreement with Manulife". At the bottom, there is a checkbox for "I agree with the terms and conditions." and a red "Continue" button.

3. Select your role and click **Get Started**.

The screenshot shows the "Select your role" screen, labeled "Step 2 of 5". It features four role selection cards, each with a description and a red "Get started" button. The roles are: "Advisor" (A licensed advisor who is contracted to sell Manulife products and services.), "Marketing assistant" (A support staff who has access to an advisor's book of business.), "Back office support staff" (An employee of a National Accounts or MGA firm who works in the back office or head office.), and "Group consultant" (An employee of a Group consulting house who recommends Manulife Group products.).

4. Complete the verification details including your selling code or dealer-rep code (e.g 3322-8JK9). Click **Continue**.

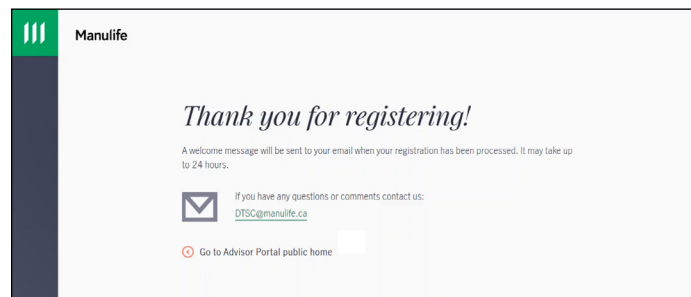


The screenshot shows the Manulife registration process at Step 3 of 7. The page is titled "Verification information" and includes a progress bar at the top. A message states: "All fields are required unless marked optional. Please review to ensure information is correct." Below this, there are input fields for "Last name" and "Company email". A question asks, "Do you know your Manulife selling code you were contracted with?" with "Yes" and "No" radio button options. At the bottom left is a "Back" button and at the bottom right is a "Continue" button. The Manulife logo is in the top left corner, and a "Contact us" link is in the top right corner. A decorative image of a blue and green feather is on the right side of the page.

5. Enter your contact details. Click **Continue**.
6. Review all the information entered to ensure its accuracy. Once confirmed, select the **Submit** button.

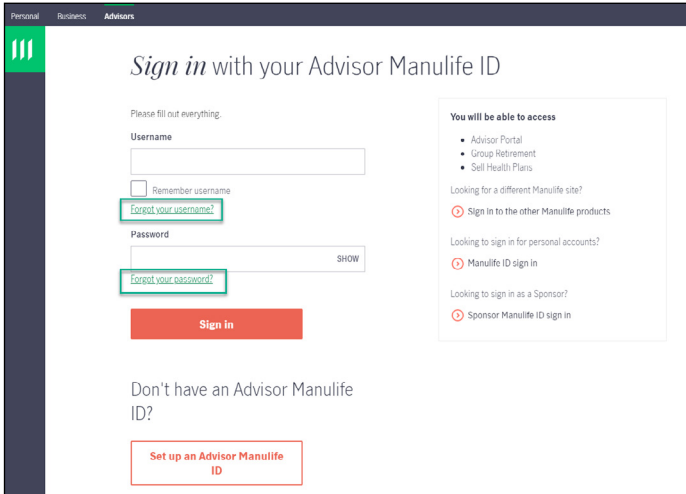
7. Your profile will be reviewed and created. Once your account has been confirmed, you'll receive an email that includes the verification link to complete your Repsource registration to begin transacting (where applicable) and accessing client information.

**Note:** If you're a Marketing Assistant, Manulife will reach out to the advisor you support for their approval before completing your registration.



## What if I forget my Advisor Manulife ID?

If you forget your Advisor Manulife ID username or password, select **Forgot your username?** or **Forgot your password?** on the sign in page.



**Congratulations, you can now access Repsource using your Advisor Manulife ID**

### Need help?

If you have questions about your new Advisor Manulife ID or need help setting it up, call our DTSC team at 1-800-667-4266. Monday – Wednesday 8AM-8PM ET; Thursday - Friday 8AM-6PM ET or email at DTSC@manulife.ca.