



# Order Request Tool



From your main dashboard, click “Order Request” in the top right corner of your screen to initiate your request.

The screenshot displays a financial dashboard with a sidebar on the left and a main content area. The top right corner features a navigation bar with a date (2025-09-01), a user name (Sophia Wellington), and a red-bordered button labeled "Order Request".

**Portfolio Summary**

Aggregate Market Value (CAD)	\$299,409.58
CAD Accounts	\$174,614.49
USD Accounts (in CAD)	\$124,795.09
In USD	\$90,875.78

**Accounts 3**

Sophia's CAD RRSP Account <span>Restricted</span>	CAD • RRSP	\$159,820.51
Sophia's CAD RRSP 1	CAD • RRSP	\$11,921.58
Sophia's USD RRSP <span>Restricted</span>	USD • RRSP	\$93,748.18

**Portfolio Composition**

**Account Type**

RRSP	\$299,409.58	100.00%
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**Asset Class**

Equities	\$180,433.71	60.26%
Fixed Income	\$77,613.95	25.92%
Alternative Investment	\$28,962.95	9.67%
Balanced Funds	\$11,921.58	3.98%

**Security Currency**

CAD	\$174,614.49	58.32%
USD	\$124,795.09	41.68%

Continue by filling out all of the information fields. Each type of order selected will add more fields pertaining to that order type. Once filled out, click “Confirm Details” in the bottom right corner.

Order Request 9 Fields

What type of order would you like to request?

Buy

Sell

Transfer

Foreign Exchange (FX)

Select an account

Sophia's CAD RRSP 1 - ABC001

Please enter the security name or security identifier

LYZ800F

Please Select

Quantity (in units) to be purchased

Amount (in dollars) to be purchased

All cash

Please enter the desired quantity for the order

10

Please select

Limit

Market

Limit price

\$10.60

Contact phone number

(905) 123-1234

Notes and special instructions ⓘ (optional)

*For illustration purposes only.*

You will then be prompted to review your request details once more to ensure accuracy, before clicking “Confirm & Send”.

Step: Submit Order Request Details

**Confirm that everything looks correct**

You're about to send this information to PortfolioHiWay for review and execution. If anything else is required, you will be contacted at the phone number you have provided.

All orders are assumed to be day orders unless special instructions are provided.

**Confirm & Send**

By clicking "Confirm & Send", you agree to the Terms & Conditions outlined on this page.

**Order Request** Modify

What type of order would you like to request?  
Buy

Select an account  
Sophia's CAD RRSP 1 - ABC001

Please enter the security name or security identifier  
LYZ800F

Please Select  
Quantity (in units) to be purchased  
10.0000

Please enter the desired quantity for the order  
10.0000

Please select  
Limit  
Limit price  
\$10.60

Contact phone number  
(905) 123-1234

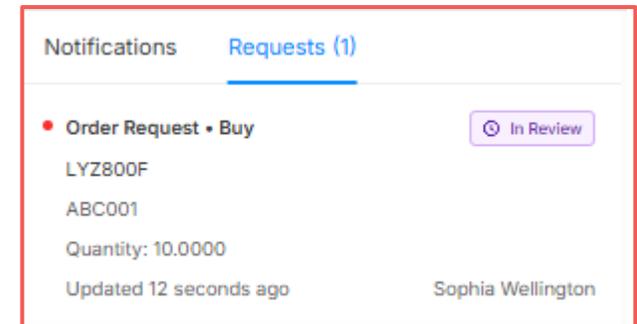
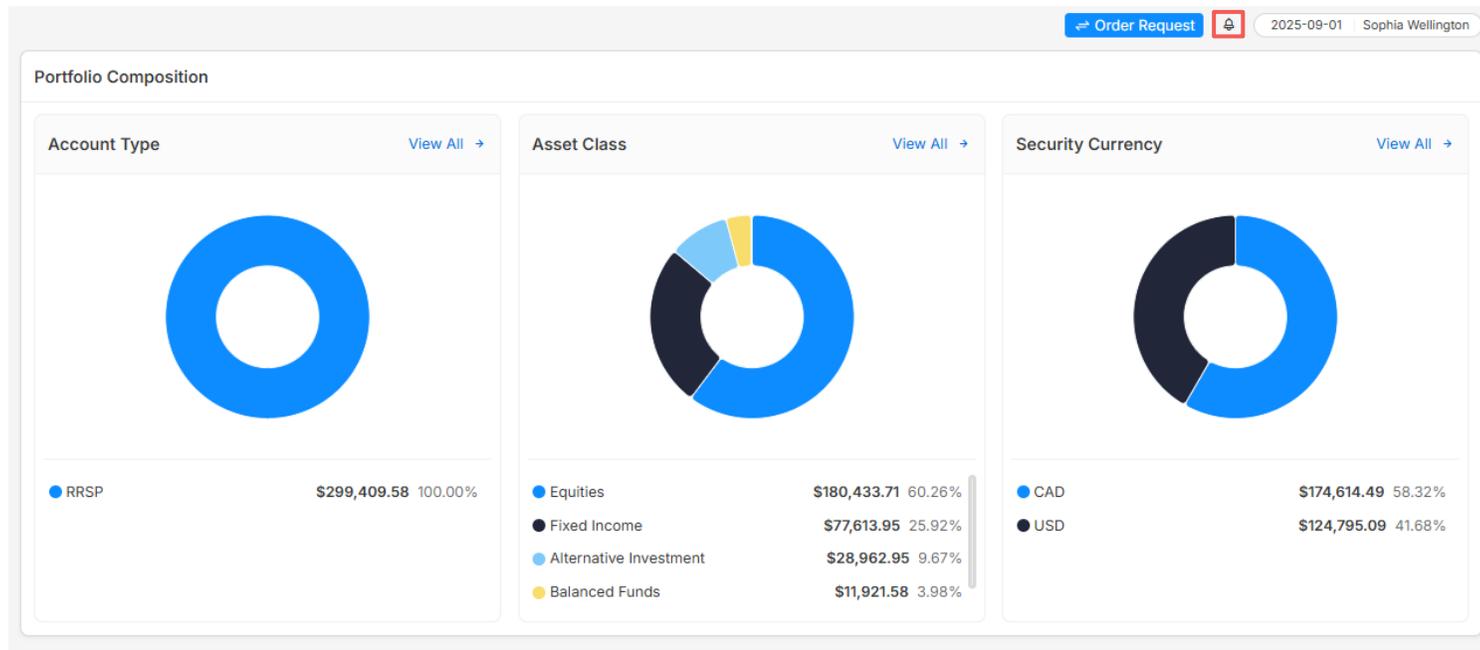
∨ Terms and Conditions

Portfolio Hiway Inc. (PHW) reserves the right to amend, cancel, or reject any order that is not in compliance with regulatory requirements and disrupts financial market integrity. If you're trading a security with rapidly changing prices, your order may face volatility risk, meaning price can rise or fall sharply in a short time. Certain funds have limitation and restrictions and might require additional documentation from you before PHW can process your order. Trailing commissions, management expense fees, and other fees and charges may apply to investment funds and exchange traded funds.

Before investing, please review the applicable fees, expenses and charges related to the fund as disclosed in the prospectus, fund facts or ETF facts for the fund at [www.sedarplus.ca](http://www.sedarplus.ca) or the issuer's website.

One of our representatives will be in touch if we need additional information to process your order. If you require any immediate assistance, please call us at [1-833-774-4929](tel:1-833-774-4929)

To view the status of your request, navigate to the notification bell in the top right corner of your main dashboard.



Notifications [Requests \(1\)](#)

- Order Request • Buy** [In Review](#)  
LYZ800F  
ABC001  
Quantity: 10.0000  
Updated 12 seconds ago Sophia Wellington

**For more help contact us at 1-833-774-4929  
or email us at [support@portfoliohiway.com](mailto:support@portfoliohiway.com)**

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