



How to: Password Reset

From Portal Dashboard

From your Portfolio HiWay client portal dashboard, click “Settings”, then click “Reset Password”.

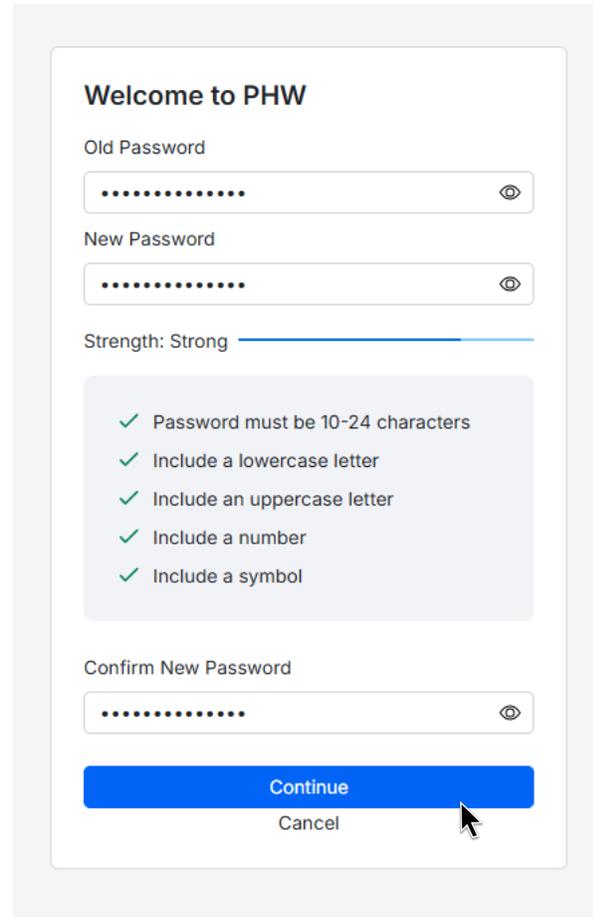
The screenshot shows the Portfolio HiWay client portal dashboard. The left sidebar contains a navigation menu with the following items: Dashboard, Analyze, Performance, Manage, Accounts, Holdings, Transactions, and Documents. The 'Settings' item is highlighted with a mouse cursor. The main content area is divided into several sections: Portfolio Summary, Portfolio Composition, Advisor Insights, and Portfolio Performance. The Portfolio Summary section displays the Aggregate Market Value (CAD) as \$299,409.58 and lists CAD Accounts and USD Accounts. The Portfolio Composition section shows three donut charts for Account Type, Asset Class, and Security Currency. The Portfolio Performance section includes a line chart showing Market Value Accrued and Cumulative Cash Flow from 2022 to 2025, along with a table of performance metrics.

The screenshot shows the 'General Settings' and 'Manage Password' sections of the client portal. The 'General Settings' section includes 'App Language' set to 'English' and 'App Display Size' set to 'Comfortable'. The 'Manage Password' section includes a 'Reset Password' button, which is highlighted with a mouse cursor. The text below the button reads: 'Reset Password. Enter your email and current password to update your login details. You'll then be prompted to create a new password to keep your account secure.'

Using the pop-up screen, enter your existing credentials. Then click “Sign in”.



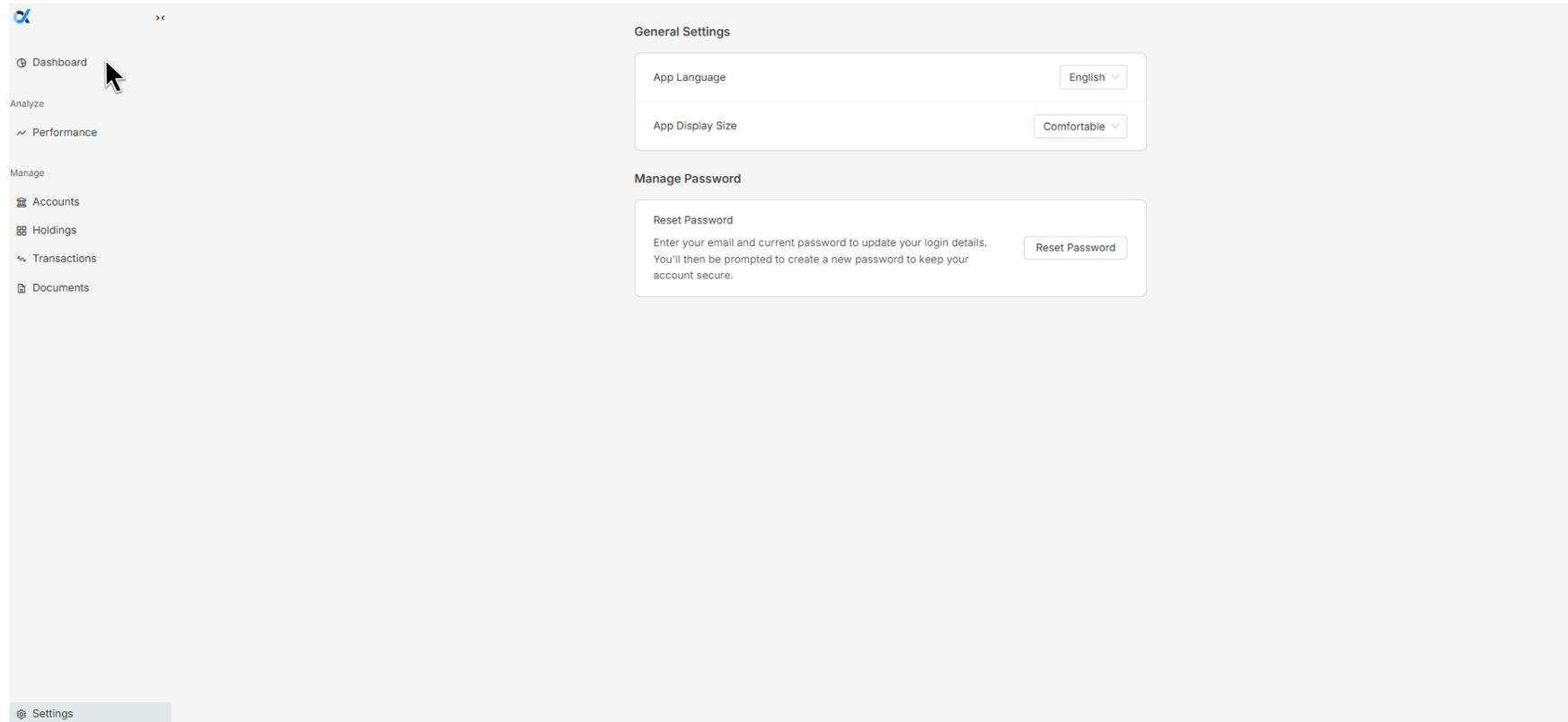
Re-enter your existing password, followed by a new password that meets the required criteria. Then click “Continue”.



The screenshot shows a password reset form with the following elements:

- Title:** Welcome to PHW
- Old Password:** A text input field with a masked password (dots) and a toggle icon.
- New Password:** A text input field with a masked password (dots) and a toggle icon.
- Strength:** A progress bar labeled "Strength: Strong" with a blue fill.
- Criteria List:** A list of requirements, each with a green checkmark:
 - ✓ Password must be 10-24 characters
 - ✓ Include a lowercase letter
 - ✓ Include an uppercase letter
 - ✓ Include a number
 - ✓ Include a symbol
- Confirm New Password:** A text input field with a masked password (dots) and a toggle icon.
- Buttons:** A blue "Continue" button and a "Cancel" button below it. A mouse cursor is pointing at the "Continue" button.

Your password has now been reset.



**For more help contact us at 1-833-774-4929
or email us at support@portfoliohiway.com**

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