MACKENZIE Investments

October 22, 2024

Dealer Relations

Coming soon… an enhanced sign-in process for AdvisorAccess and InvestorAccess

Mackenzie is invested in supporting your business by modernizing and updating the sign-in for our account inquiry portals, AdvisorAccess and InvestorAccess.

On or around November 4, 2024, we're introducing new sign-in credentials and a two-step verification as an additional layer of security for these platforms.

What this means for your advisors

- When advisors sign in to AdvisorAccess after the change, they'll be prompted to set up a new User ID by completing a few simple steps.
- To ensure security, their new user ID will be their email address.
    - Advisors will need to use the email associated with their business, as public email domains will be restricted for use to protect and ensure the security of private client data
- Each time advisors sign in, they'll be asked to enter a six-digit code they'll receive by email.
- Access to advisors' client account information will not be interrupted.

What this means for your clients

- When clients sign in to InvestorAccess after the change, they'll be prompted to activate two-step verification.
- Verification codes will be sent to their mobile phones.

Communicating about the changes

- We'll be adding messages about the upcoming changes to the sign-in pages of AdvisorAccess and InvestorAccess, starting October 23.
- Advisors will receive an email about the enhancements on October 23, followed by an email with more detailed information on October 30.

Resources and support

Our Client Relations team is here to assist advisors and clients if they need help with the transition. They can be reached at 1-800-387-0614, Monday through Friday from 8:30 am to 6:00 pm ET.

We'll also be providing a step-by-step guide and other resources to guide users through the set-up process. You can watch this short video for a preview of the upcoming changes.

We value your ongoing partnership and will continue to share the progress that we're making in our efforts to improve our digital tools.

Questions?

If you have questions or need additional information, please contact your Dealer Relations Account Manager directly or send an email to drelations@mackenzieinvestments.com.

Thank you for your continued support of Mackenzie Investments.

The Dealer Relations Team

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