Guide to Our **Online Portal**

All your account information
viewed in one place, through a single login.

CANTOR Fitzgerald

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INTRODUCTION

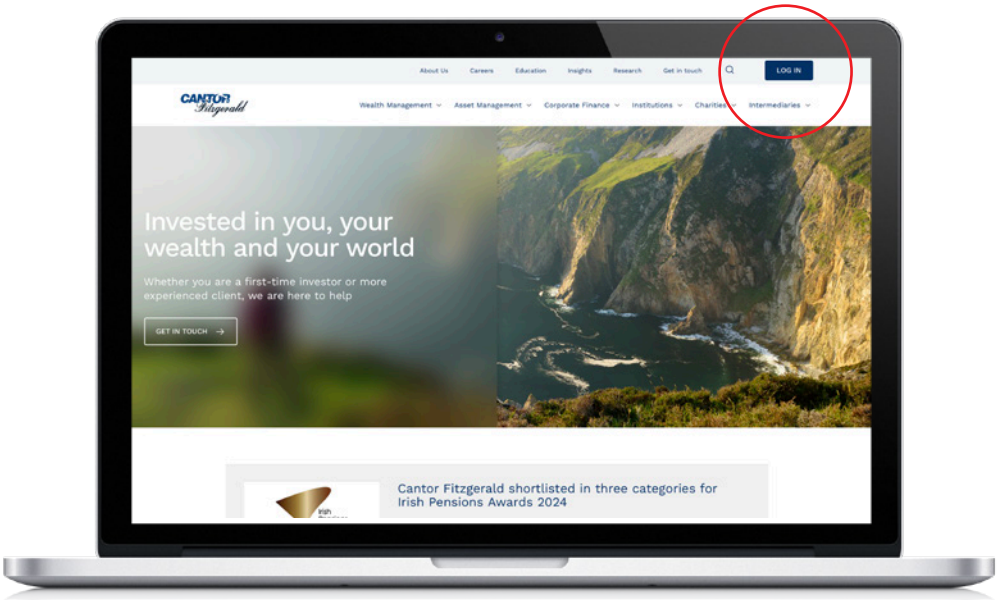
At Cantor Fitzgerald we are committed to the highest level of service for our clients. All of your account information can now be viewed in one place, through a single login. The portal gives you instant access to view portfolio details, notifications about your accounts and to download documents – at a time that is convenient for you.

Should you require assistance, please email our Client Services team who will be more than happy to help at **ireland@cantor.com**.

SECTION 1:
ACCESSING YOUR PORTAL

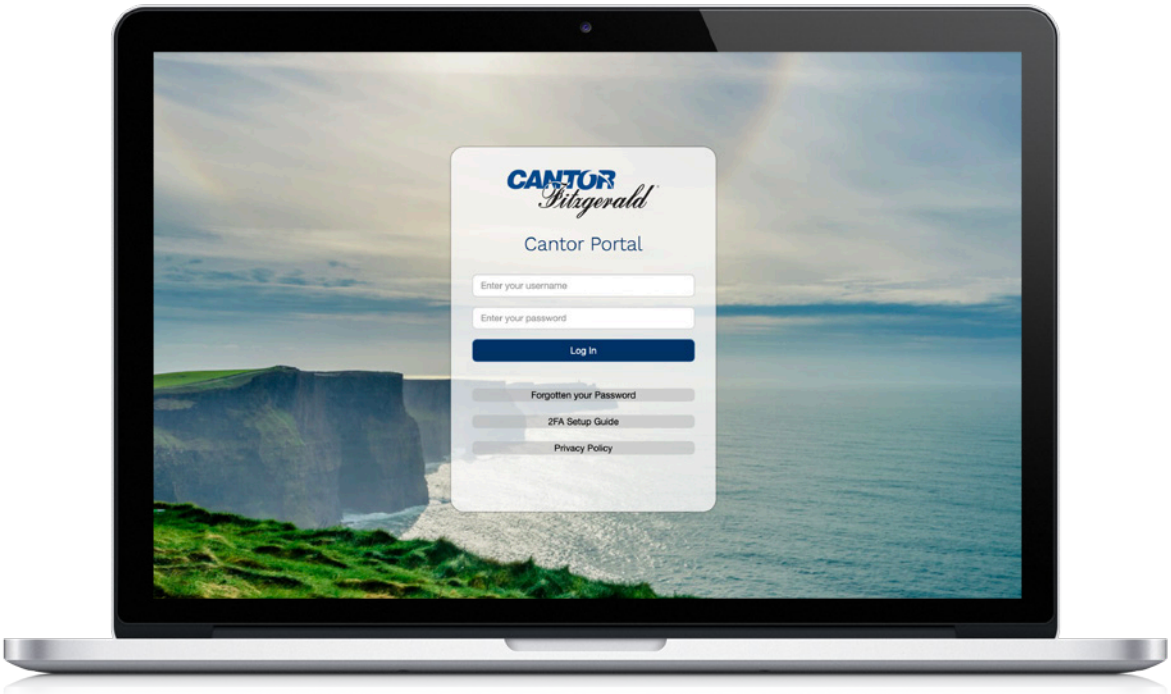
Login from Home Page

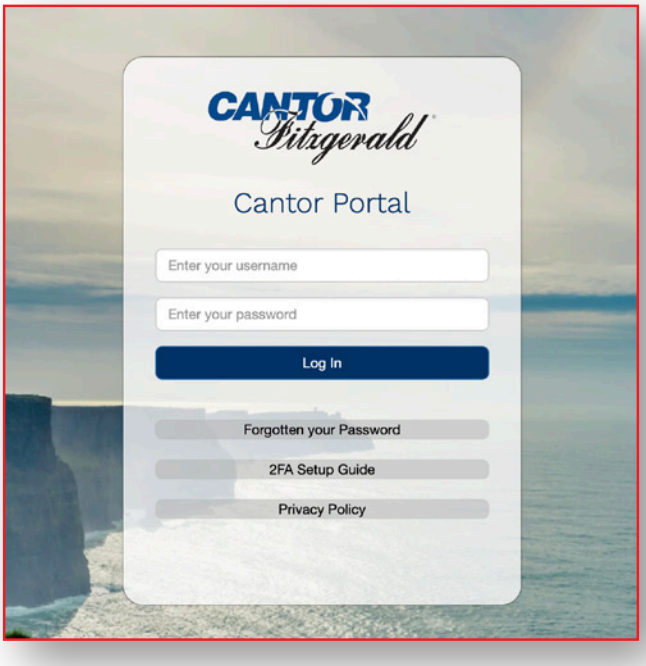
To access your portal, please go to www.cantorfitzgerald.ie. Click the Login button on the top right of the web page, which will bring you directly to your portal login.



Portal Login

Once you have clicked this, you will be brought to the following area to enter your login details.





Note: Your username is your DS number and your password is something you would have created.

SECTION 2:
NEW USERS – INITIAL REGISTRATION

Introduction

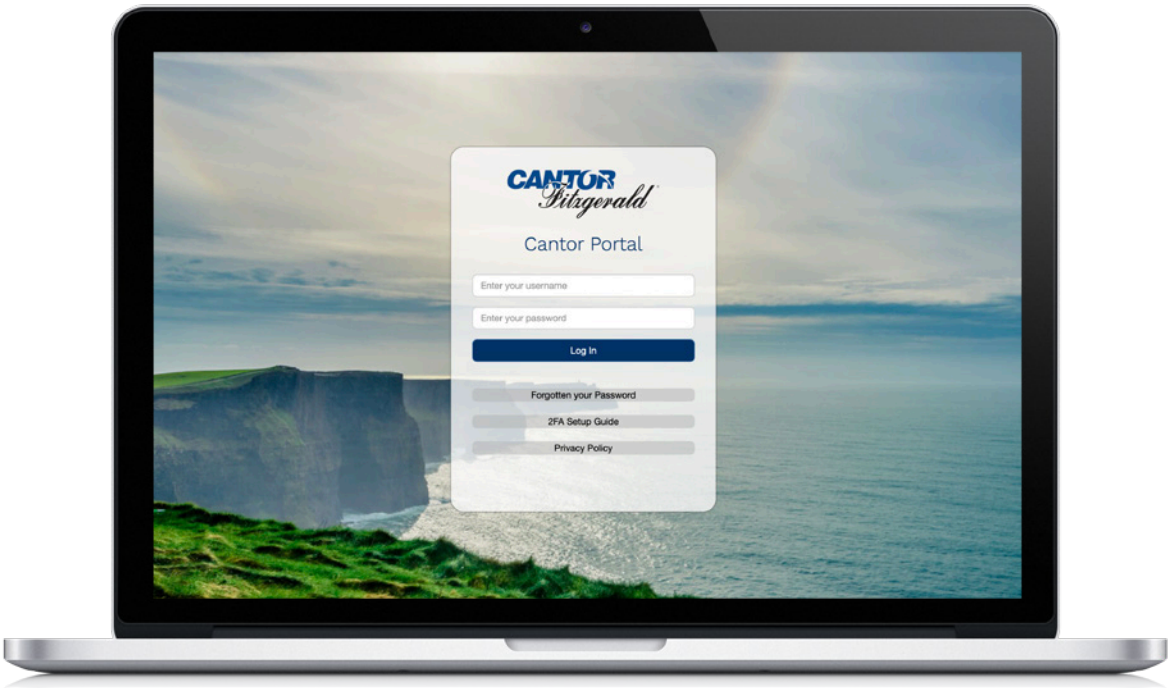
Prior to your initial login, our Client Services team will issue you with a username and a temporary password. If you have not received these details, please contact the team via phone on 01 633 3800 or email at ireland@cantor.com. When you are logging in for the first time you will be prompted to finish the registration process which will include the following:

1. Completing 2FA registration.

2. Confirmation of your email address

3. Receiving the access PIN

4. Creating a new permanent password



2FA Setup Instructions

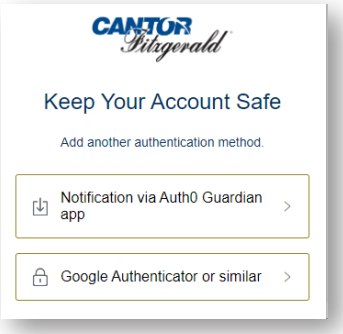
This process is to set up two-factor authentication (2FA) for your desktop login. You'll need a mobile phone to complete this setup and to sign in to your desktop in the future.

1. DESKTOP:

Go to: https://cantorportal.com/apex/r/mcext/cportal/

2. DESKTOP:

Login to the portal using your Cantor credentials. Then click 'Google Authenticator or similar'



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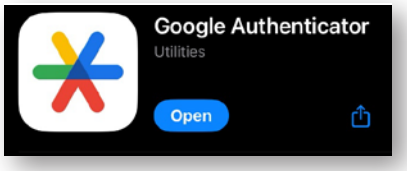
3. MOBILE:

Now using your mobile - Go to your application store - App Store or Play Store.

4. MOBILE:

Download the 'Google Authenticator' app.



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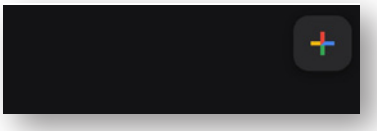
5. MOBILE:

Open the Google Authenticator app. Login or Sign in if required.

Click the plus symbol on the bottom right of your screen.

Click on Scan a QR code.



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6. MOBILE:

Scan the QR Code that's shown on your desktop screen.

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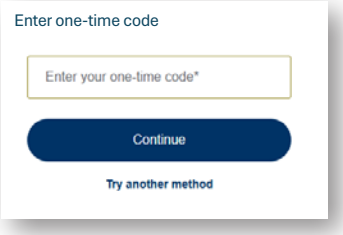
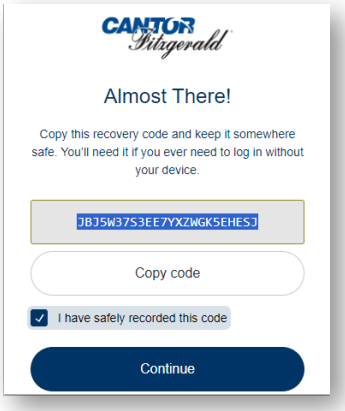
7. DESKTOP:

Enter the one time code from the Google Authenticator app on your desktop screen.



8. DESKTOP:

Take note of the Recovery Code on your Desktop Screen. You'll need it if you ever need to log in without your device.



9. DESKTOP:

Click on I have safely recorded this code'.

10. DESKTOP:

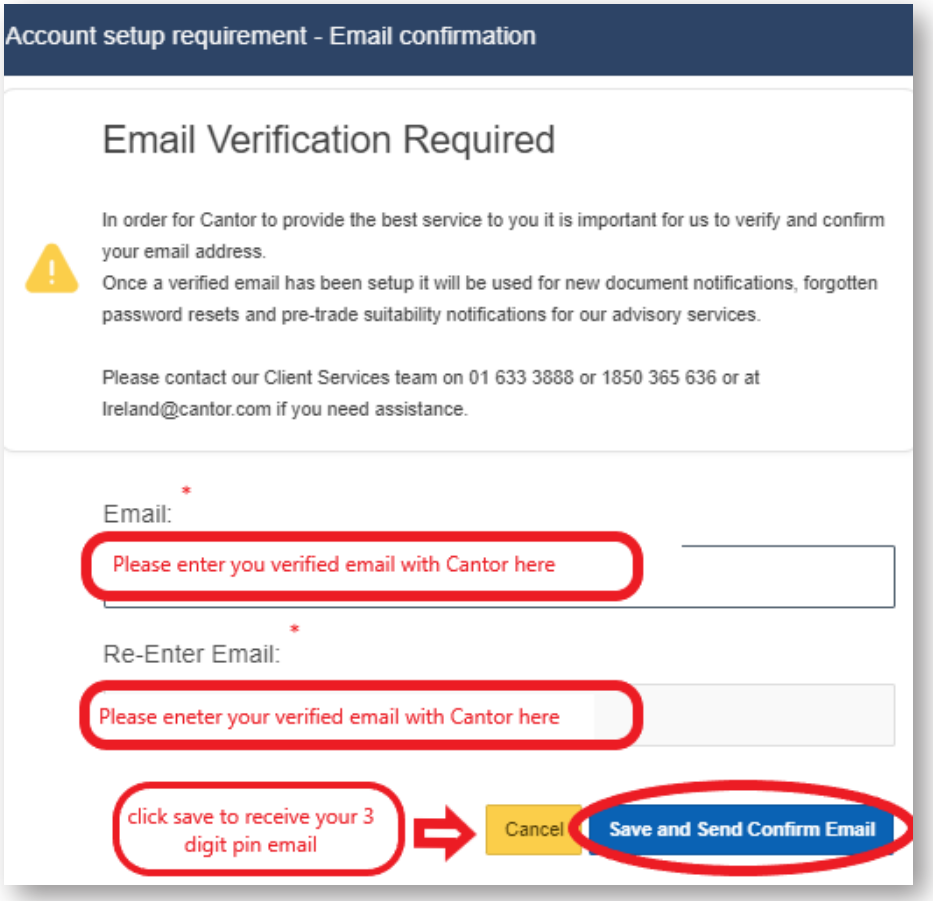
Click 'Continue'.

The two-factor authentication (2FA) setup is now successfully completed.

Note: You will need to open your Google Authenticator app each time you log in to get your one-time code.

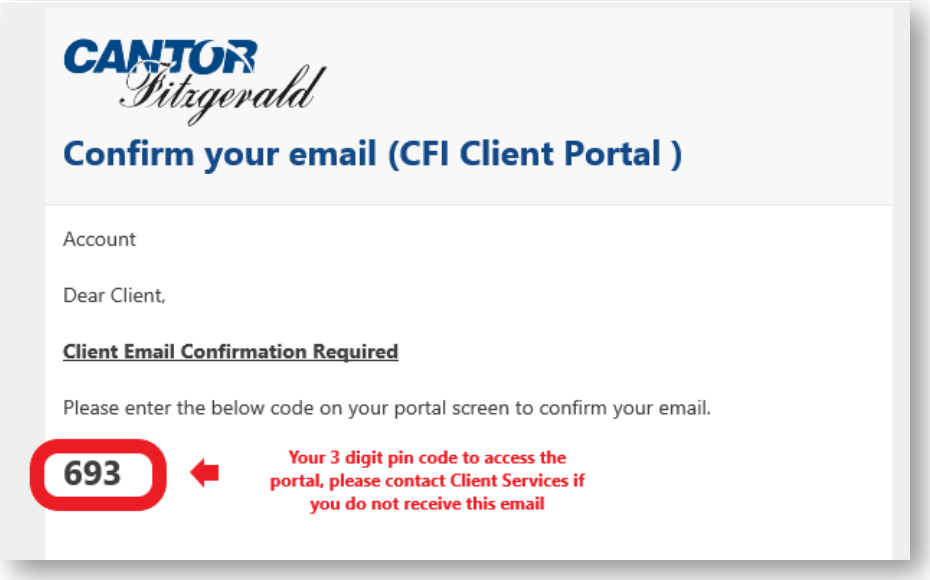
Confirmation of Your Verified Email Address

We will ask you to confirm your verified email address for the security of your account. To do so, please enter the verified email address most recently supplied to us. You will need to confirm the email twice, click 'Save and Send Confirm Email".



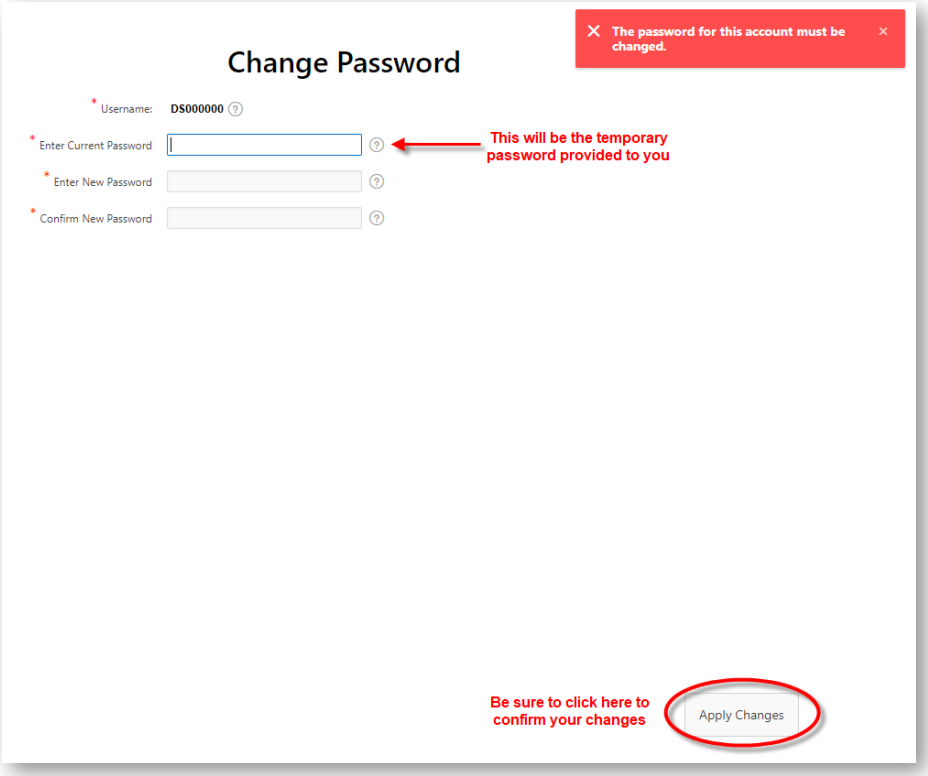
Receiving the Access PIN

In order to complete the email verification, you will receive an email from noreply@cantor.com which will have your 3 digit pin which you will need to input on the portal to continue. This is a one-off request for the initial set up of the account.



Creating a New Password

As a new user who is logging in for the first time, you will need to create a new permanent password.



Password Rules

1. Must contain all of the following:

   a) at least one uppercase letter

   b) at least one lowercase letter

   c) at least one number

   d) at least one of the following special characters: ! " # $ % & ( ) ` * + , - / : ; < = > ? _

2. Must be 8-16 characters in length.

3. Must **not** contain a repeating set of 3 or more characters, ie. "aa" is allowed, but "aaa" is not.

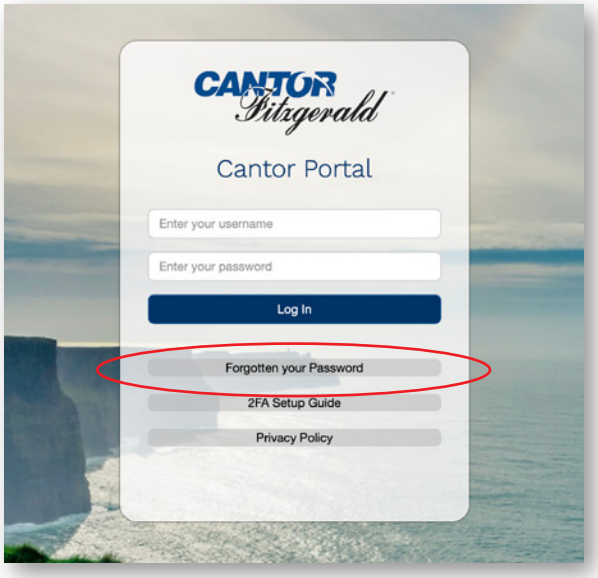
4. Must **not** contain spaces.

5. Must **not** contain the username or reverse of the username.

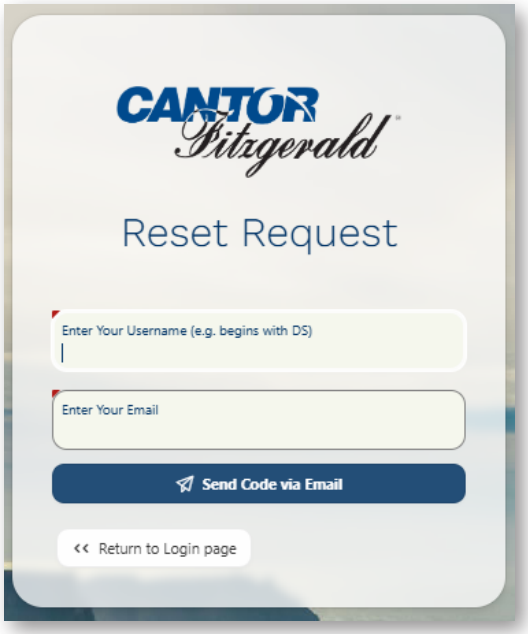
6. Must **not** contain any part (first or second) or the reverse of any part of the user's name that is longer than 3 characters, ie. "Ed" is allowed but "Eddie" is not.

For the safety of your account do not share your password with anyone

SECTION 3:
WHAT TO DO IF YOU FORGET YOUR PASSWORD



In the event you forget your password, you will then be able to use the 'Forgotten Your Password' link on the login screen to reset your password.



Enter your Cantor username and your Cantor verified email address to send a temporary password to your email.

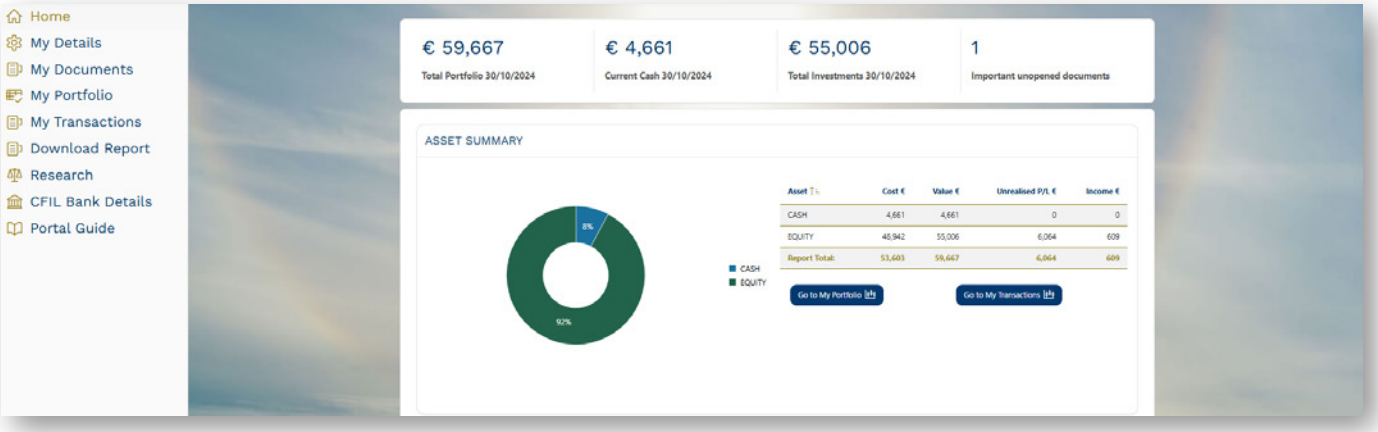
Click on Return to Login Page and enter your new password to login. You will be prompted to change your temporary password upon logging in.

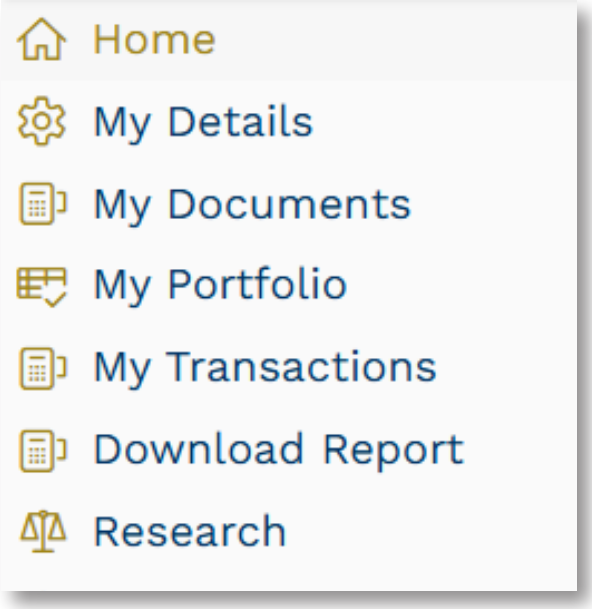
It is important to note that if you enter the incorrect information 3 times or more the account is automatically locked. If this occurs, please contact our Client Services team who will unlock your account.

SECTION 4:
USING YOUR PORTAL

Home Page

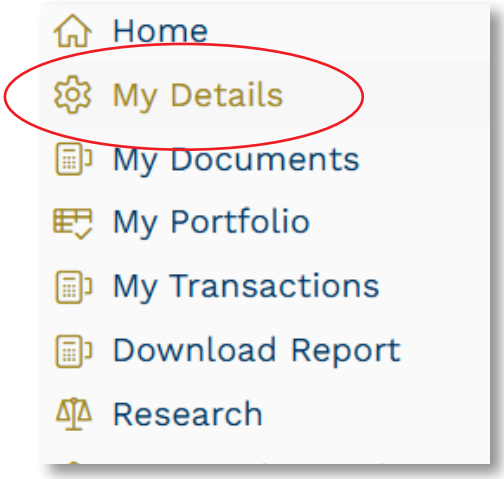
The home page displays key information about your account in a simple, easy-to-navigate format. You can quickly access information by clicking the boxes and charts.





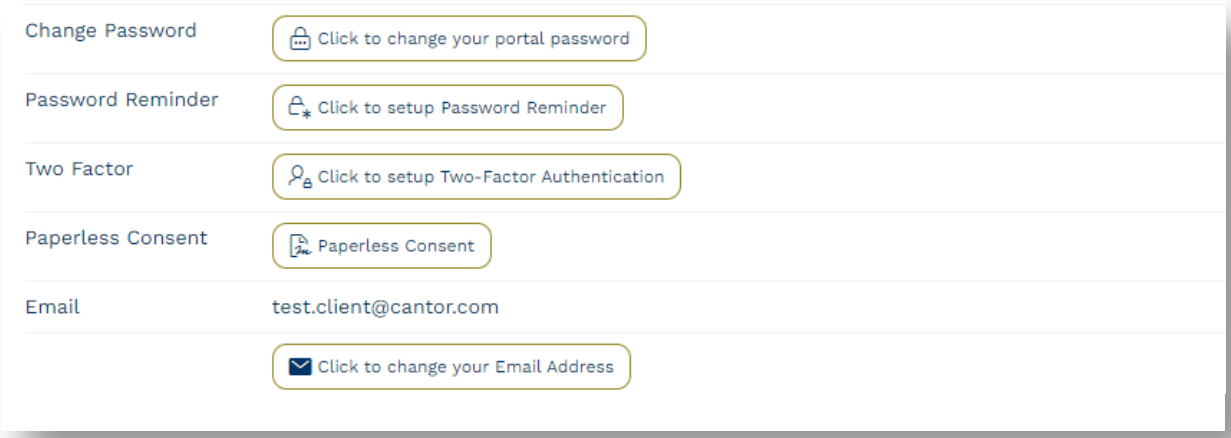
You can navigate through the portal by clicking each tab on the left-hand side of the page.

My Details

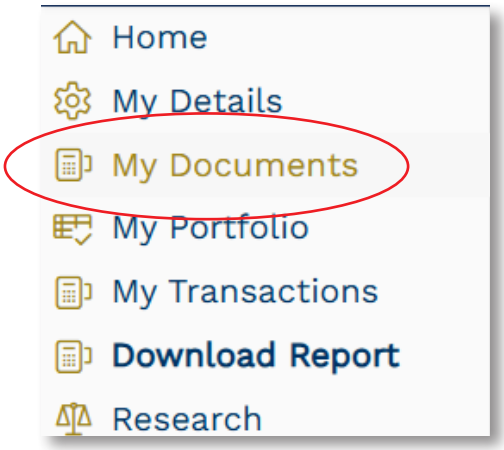


My Details page contains your core account details with options to view your current financial information, knowledge and experience, investment objectives, attitude to risk, and other important information which we have on file for you..

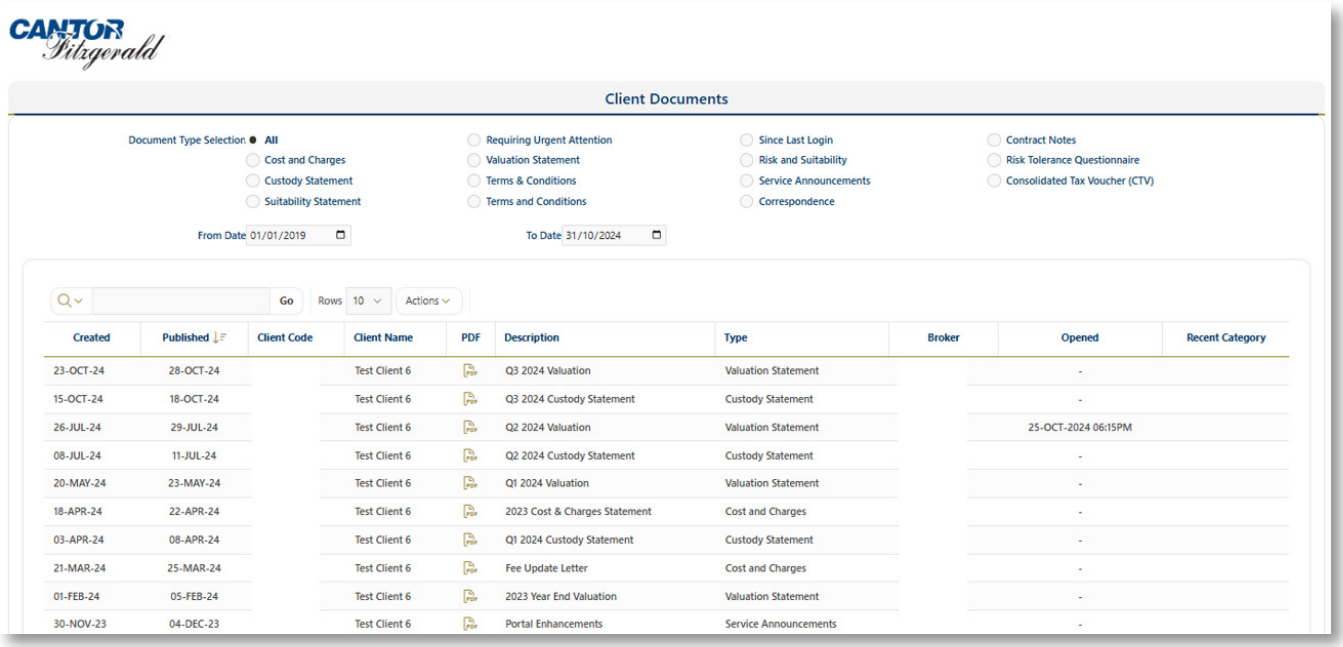
In the My Details section under My Cantor Account Details, you have the ability to change your password, set up your security questions, enable two-factor authentication, update your consent preferences, and update your email address.



My Documents



My Documents allows you to view all correspondence which we have issued to you regarding your account. You can view your documents in chronological order or you can choose the documents you wish to view by category. In order to open the document, click on the PDF button next to the Description.



Client Documents

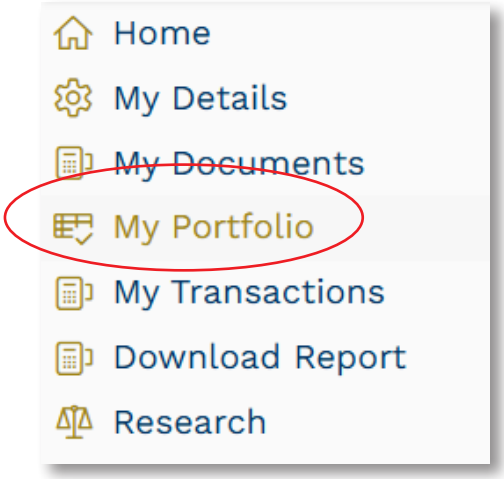
Document Type Selection: All, Cost and Charges, Custody Statement, Suitability Statement, Requiring Urgent Attention, Valuation Statement, Terms & Conditions, Terms and Conditions, Since Last Login, Risk and Suitability, Service Announcements, Correspondence, Contract Notes, Risk Tolerance Questionnaire, Consolidated Tax Voucher (CTV)

From Date 01/01/2019 To Date 31/10/2024

Go Rows 10 Actions

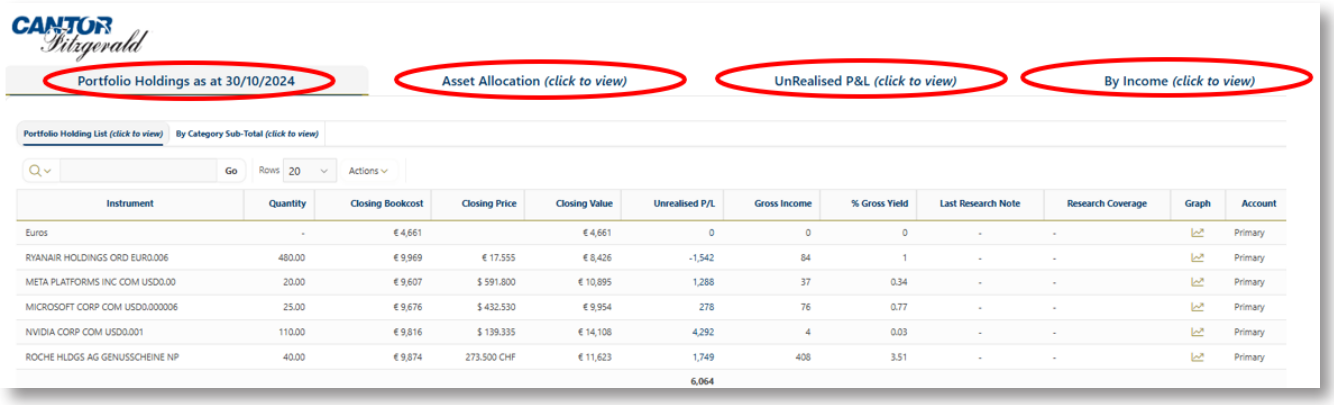
Created	Published	Client Code	Client Name	PDF	Description	Type	Broker	Opened	Recent Category
23-OCT-24	28-OCT-24		Test Client 6		Q3 2024 Valuation	Valuation Statement		-	
15-OCT-24	18-OCT-24		Test Client 6		Q3 2024 Custody Statement	Custody Statement		-	
26-JUL-24	29-JUL-24		Test Client 6		Q2 2024 Valuation	Valuation Statement		25-OCT-2024 06:15PM	
08-JUL-24	11-JUL-24		Test Client 6		Q2 2024 Custody Statement	Custody Statement		-	
20-MAY-24	23-MAY-24		Test Client 6		Q1 2024 Valuation	Valuation Statement		-	
18-APR-24	22-APR-24		Test Client 6		2023 Cost & Charges Statement	Cost and Charges		-	
03-APR-24	08-APR-24		Test Client 6		Q1 2024 Custody Statement	Custody Statement		-	
21-MAR-24	25-MAR-24		Test Client 6		Fee Update Letter	Cost and Charges		-	
01-FEB-24	05-FEB-24		Test Client 6		2023 Year End Valuation	Valuation Statement		-	
30-NOV-23	04-DEC-23		Test Client 6		Portal Enhancements	Service Announcements		-	

My Portfolio



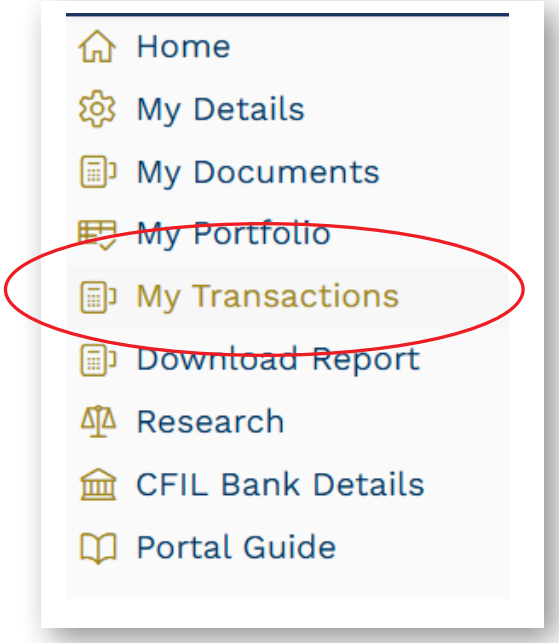
My Portfolio allows you to drill down into your Portfolio Holdings where you can view by Asset Allocation, Unrealised P&L, and by Income.

Click on each tab at the top to view.

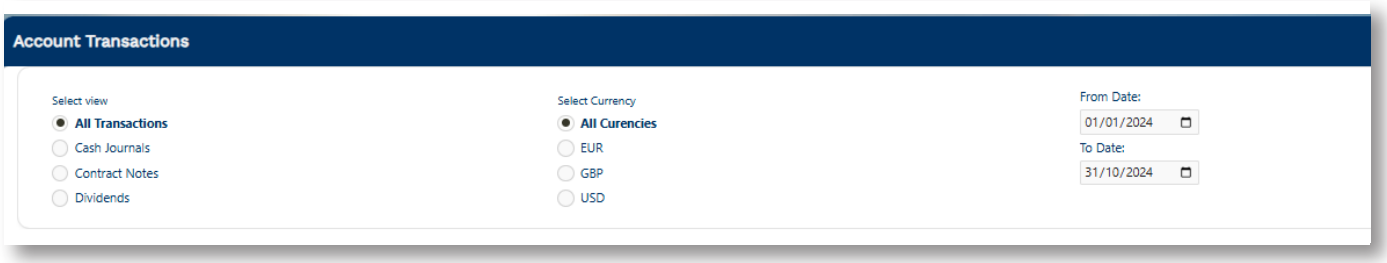


Instrument	Quantity	Closing Bookcost	Closing Price	Closing Value	Unrealised P/L	Gross Income	% Gross Yield	Last Research Note	Research Coverage	Graph	Account
Euros	-	€ 4,661		€ 4,661	0	0	0	-	-		Primary
RYANAIR HOLDINGS ORD EUR0.006	480.00	€ 9,969	€ 17.555	€ 8,426	-1,542	84	1	-	-		Primary
META PLATFORMS INC COM USD0.00	20.00	€ 9,607	$ 591.800	€ 10,895	1,288	37	0.34	-	-		Primary
MICROSOFT CORP COM USD0.000006	25.00	€ 9,676	$ 432.530	€ 9,954	278	76	0.77	-	-		Primary
NVIDIA CORP COM USD0.001	110.00	€ 9,816	$ 139.335	€ 14,108	4,292	4	0.03	-	-		Primary
ROCHE HLDGS AG GENUSSCHEINE NP	40.00	€ 9,874	273.500 CHF	€ 11,623	1,749	408	3.51	-	-		Primary
					6,064						

My Transactions

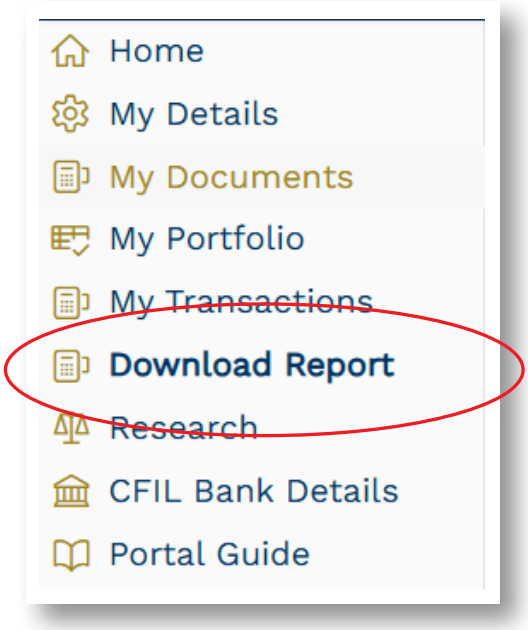


You can view all your transactions at the click of a button. Open the My Transaction module and your transactions are shown in date order, Newest to Oldest.



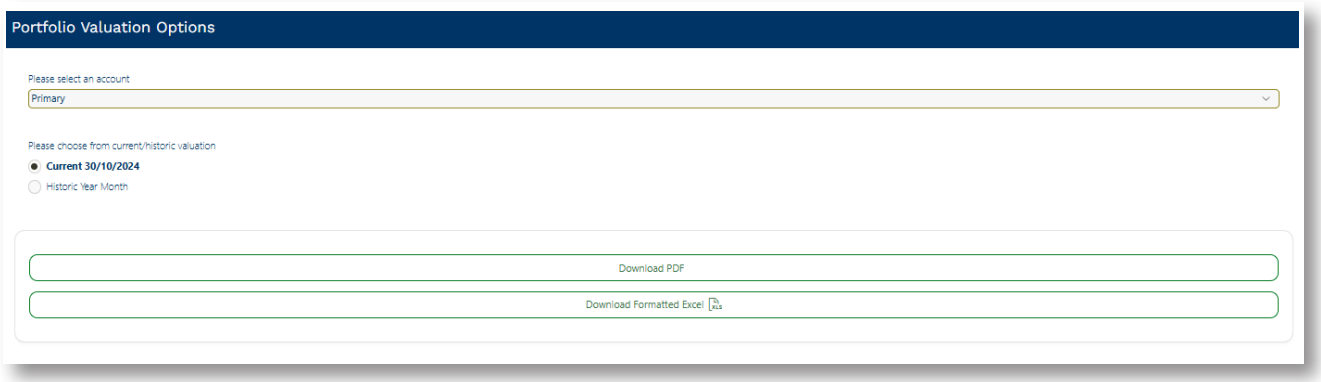
You then have the option to filter by, Cash Journals, Contract Notes & Dividends.
You can also Select Currency and choose your Date Range.

Download Reports



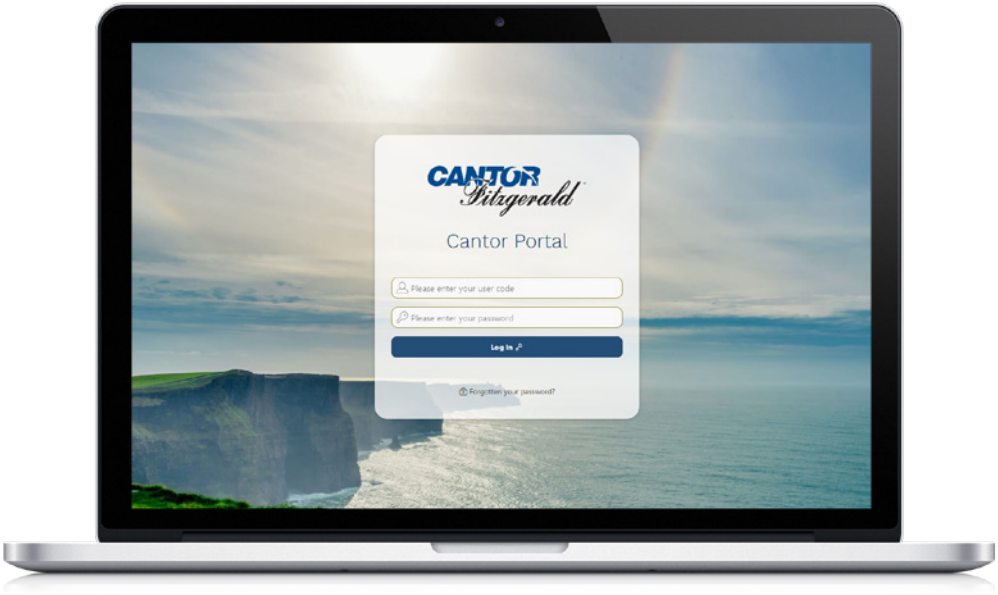
On your portal, open the Download Reports tab.

By default, you will be directed to the Portfolio Valuation option. From here you can download a current or historic valuation of your account a PDF of Excel format.



You can also choose to run any of the following reports from the Download Reports tab in your portal;

1. Portfolio Valuation (current or historic)
2. Transaction Statement
3. Trade Listing
4. Dividend Listing



Should you have any questions about this guide or your client portal,

please contact our **Client Services team on 01 633 3800**.

DUBLIN: Cantor Fitzgerald House, 23 St. Stephen's Green, Dublin 2, D02 AR55
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www.cantorfitzgerald.ie

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