



Frequently Asked Questions:

What is the Investor Portal?

- 24/7 access to your account online
- Update your personal information to ensure we have the correct contact information over a secured platform
- Review previous investments (from January 1, 2016) as well as up to date information on your past investments
- Review current opportunities and initiating investments online
- Financial and regulatory statements
- Links to your custodian accounts

Who is TriView Capital Ltd?

- Founded in 2012, TriView Capital Ltd. has deployed over \$400 million of private equity placement and has received multiple Private Capital Markets Association of Canada awards including Best Private Equity deals in 2013, 2015, 2016, 2017, and 2018. Please go to <https://triviewcapital.com> or contact your dealing representative for more information.

Why do I need to enter all this information?

- This information is for your Know Your Client (KYC) form, as per National Instruments 31-103 all clients are required to complete a KYC before they can make an investment.
- KYC information is collected through the Investor Information Form (IIF) and forms the basis for determining whether trades in securities are suitable for investors. The client's investment objectives, and risk tolerance must be assessed based on the client's financial and personal circumstances including time horizon. The stated investment objectives and risk tolerance should be reasonable in light of those circumstances.

How do I know the Investor Portal is secure?

- At TriView, we place a high degree of importance on the security of your personal and financial information. Our site uses the latest security technologies to protect your privacy and ensure your data is secure.
- 2048 Bit SSL certificates the web standard for security.



What if I forget my password?

- If you forget your password click on **Forget Password** to send a link to your email to reset your password.

TRIVIEW CAPITAL LTD
SIGN IN

Email

Password

REMEMBER ME [Forgot password?](#)

How do I change my password?

- When you are logged into you account, click on Home and scroll down until you see **change your password**. This will be on the right hand side, here you will be able to enter your new password. You will need to enter the old password in order to change the password.

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UPDATE INFORMATION

Choose File: No file chosen

Password
(leave blank if you don't want to change it)

Confirm Password

Current Password
(we need your current password to confirm your changes)

UPDATE PROFILE

CANCEL

How do I find my Dealing Representative contact information?

- Your dealing representative's information is located on your home page on the Client Dashboard in your investor portal.
- If you do not have a dealing representative please contact info@triviewcapital.com or 403-984-6570

How do I sign into the Investor Portal?

- If you do not have a dealing representative, please click on **sign up here** and follow the prompts. Once you have completed the application you will be assigned to a dealing representative.
- If provided a **URL link** from your dealing representative, you will need to enter your email address and create password. You will then receive an email to confirm you created this account. Click on the confirmation link, enter your email and password and then follow the instructions



What happens if I forget to log out?

- Your session will time out after 1 hour

How do I make an Investment?

- Go into current offerings and choose which investment you are interested in
- Click on Invest now and enter how much you want to invest
- Your Dealing Representative will follow up with you to proceed with the investment if deemed suitable
- OR contact your Dealing Representative

What if there is incorrect information?

- Please contact your Dealing Representative or info@triviewcapital.com

Why is there nothing showing prior to January 1, 2016?

- On this date, we transitioned to the use of our automated back-office system