



User Guide

Wealthscope For Advisor

November 2025

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Application Design

There are two views: **Advisor** and **Client**. The top-right corner of each page tells you which view you are in: when it is **light blue**, you are in Advisor view (hence “ME” in brackets); when it is **navy blue**, you are in Client view (with your client’s name). There will also be a **purple** border around the entire screen when you are in Client view.

Advisor View



Client View



There is a menu bar at the top of the application, denoting the feature segments available for the advisor and each client. On the left-hand side of the application, there is a navy blue navigation bar, with important destination points, such as the Advisor Dashboard, Client Management.

Feature Segments

There are four integrated segments: **ACCOUNTS**, **PORTFOLIOS**, **PLANNING**, and **TOOLS** on the top menu bar. These segments are available in the Advisor view (for you to test drive ideas) and in the Client view. In the Client view, everything that you save is saved for that client only.

IMPORTANT: To get started, we suggest that you save your model portfolios first in the Advisor View. In **PORTFOLIOS**, we offer several Portfolio Builders and the ability for you to designate portfolios as **Model Portfolios**. This designation allows you to compare different client portfolios to your models and conduct portfolio simulations in **PLANNING**, for *all* of your clients.

Please follow these steps:

- i. In the **Advisor** view, create and analyze a portfolio using any one of the Portfolios Builders.
- ii. Save the portfolio by selecting the disk icon on the left panel of the Wealthscope Portfolio Scorecard.
- iii. To designate a saved portfolio as a model portfolio, revisit your saved portfolio (**PORTFOLIOS** -> Create or Revisit a Portfolio -> See saved portfolios) and toggle it as a Model. This function is only available in the **Advisor** view.
- iv. Your models will now show up in portfolio dropdown menus in select tools, in *all* Client views.

1. Landing Page

1.1 Add Client

This is where you enter a new client and their information. First name, last name, and email address are the only required fields. The email address serves as a unique identifier only - rest assured that we will not email your clients. Once the information is entered, click the 'Save & Go' button.



You will then immediately enter the view of the client you have just created. You can start uploading/entering and analyzing their investment accounts and building portfolio ideas and retirement plans for the client. See Section 3 "Feature Segments" below for your choices.

Note: If you want to link and automatically update your clients' information from your custodian, please email us (contact@wealthscope.ca) re: setting up a connection.

1.2 Client Management

This is where you can search and access a client. The arrow highlighted in purple to the right of a client's name allows you to enter the Client view.



You may group different clients' investment accounts together as a family for analysis by selecting the 'Add New Family' button.

Once in "Add New Family", you must designate a client to be the "Family Head". The name of the family will be represented by the surname of the family head. Next, you can add family members by selecting the "Add New Family Member" button. For family grouping, only the portfolio analysis functionality is available. Here, you can analyze all family members' investment accounts together or in specific groupings. **Note:** clients cannot belong to multiple families.



To revisit a family, click the "Home" icon highlighted in orange to the left of the client whose family you would like to view.



1.3 Advisor Dashboard

This dashboard displays your aggregated client information at the top and a high-level summary of individual clients at the bottom. After you have added clients, click the "Go to Client View" button to enter the Client View for a specific client.



2. Navigation

2.1. Top Menu Bar

It is important to remember that the feature segments, **ACCOUNTS**, **PORTFOLIO**, **PLANNING**, and **TOOLS**, are available to the advisor for testing as well as to each client. When an action is performed inside Client View, any information saved will be attached only to that specific client's record. You will not see this information anywhere else. Likewise inside the Advisor view, except for portfolios designated as model portfolios and saved custom benchmarks.

2.2 Left Side Bar

While in the Advisor view, this icon takes you to the Client Management page. You can add and manage individual clients and households there.



When in the Client view, this icon returns you to the Advisor view, taking you back to the Advisor Dashboard.



This icon links to the Getting Started Guide.



3. Feature Segments

There are four integrated segments: **ACCOUNTS**, **PORTFOLIOS**, **PLANNING**, **TOOLS** and **UPDATES** (top menu bar).

3.1 Accounts

See a consolidated view of your client's investments across different financial institutions and have them analyzed on demand. The securities currently supported in the analysis are Canadian and U.S. stocks, Canadian and U.S. ETFs, Canadian mutual and aggregated funds (except private pooled funds - contact us if you want to set up a data feed), and most bank HISA funds.

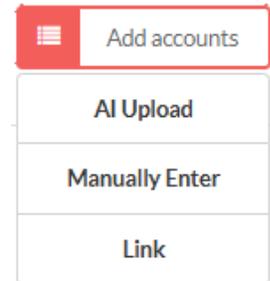
Unfortunately, securities with a fixed maturity date such as individual bonds and derivatives cannot be analyzed at this time.

3.1.1 Populating Accounts

There are three ways to populate your client’s account information. You can link their accounts directly through Wealthica, upload an account image with holdings or a statement in PDF format, or manually input their accounts. Account values are updated daily.

Go to “Add accounts” at the top of the “Overview” tab.

1. **AI Upload:** Ensure the account details are correctly entered. Once processing is complete, you will be taken to the ‘Account Edit’ view. Check all the pre-populated data, edit if necessary, and save.
2. **Manually Enter:**
 - i. Enter institution name, account type (e.g., TFSA, RRSP....etc.), and account currency;
 - ii. Search and select holdings; adding cash (non-interest-bearing) is optional;
 - iii. Enter the holdings' corresponding quantities (number of shares/units)....etc.
 - iv. You can also add GICs (Canada) or CDs (U.S.) and their corresponding fixed interest rate.
 - v. You can add your advisor fee (as a percentage) here to show in the "Fees" tab of the Portfolio Scorecard. We will display the advisor fee in addition to the fund fees. Note that the advisor fee is not taken into account in determining the Fees grade in the Scorecard; only fund fees will be considered.
3. **Link:** This option requires your client to have an existing Wealthica account and have aggregated their account information on Wealthica’s website. You will also need to have their Wealthica login credentials.



Note: we are also happy to work with your **custodial partner** to sync your client data directly. Please contact us for details.

Once you have added accounts, the “Overview” tab on the left of the screen will display an aggregation of key account information across all accounts added such as the top 10 holdings. Individual tabs below will also appear for each investment account.

Click on an account to view basic account information. The table here has several columns, so do not forget to scroll right using the blue arrow to see more.

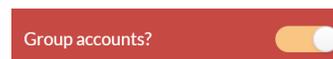


3.3.2 Analyze

To generate your **Wealthscope Portfolio Scorecard** (details in Section 4 below) for an investment account, click the “Analyze” button in the top right corner. USD accounts can be analyzed in CAD or USD. There is also an option to include the account’s cash balance in the analysis when you hover over the ‘Analyze’ button.



Toggle “**Group accounts?**” in top left of the Accounts View to select and analyze a specific group of accounts. When grouping accounts in different currencies, USD accounts are converted to CAD. Once grouped, click the ‘Analyze’ button.



Once you have clicked ‘Analyze’, you will land on the Wealthscope Portfolio Scorecard’s Overview tab. There are several useful tools here:

1. **Compare** an account with a portfolio previously saved in the **PORTFOLIOS** segment (see Section 3.2 below), or with a “What-if” portfolio you specify on the fly, or to an account (or a group of accounts) saved in **ACCOUNTS**. The ‘Compare’ function (the ‘Scale’ icon) can be found on the left panel of the Scorecard. 
2. **Replace** an excluded holding (if any) in the Scorecard due to its short history with a proxy by clicking the ‘Replace’ icon next to the holding, denoted by the double arrow. To read Wealthscope’s exclusion rules, hover over “Guidelines” in the Scorecard above the list of holdings. 
3. **Save** is an important feature to remember. In the scorecard, saving an account as a portfolio (a different Wealthscope type) allows you to use it in the Planning segment for simulations, as well as in several tools in the Tools segment. The save icon can be found on the left panel of the Scorecard. 
4. To print or download the Scorecard as a PDF file, click the Printer icon on the left. 
5. Turn on/off the Wealthscope scores (the letter and percentage grades). Every client conversation is different. Some clients appreciate a clear score to frame the discussion — others respond better when you guide the narrative using raw data and your professional insights. You can choose the approach that works best for you. In the Scorecard, click the ‘Eye’ icon on the left panel to show/hide the scores. Go to Section 4 to read about how the scores are calculated and how you can set a global preference for hiding/showing the scores, i.e., whenever you land on the scorecard in the application. 

3.3.2 Other Important Functionalities

There are important tools in the dropdown menu when you select “More” to the right of the “Analyze” button.



1. **Rebalancing:** Keep track of whether account holding weights are in line with specified target weights. Note: this tool is available for individual accounts only. You will need to update the target weights whenever there are changes in the holdings.

2. **Reallocate:** Calculate the transactions required to switch your client from their existing account to your recommended one, be it a model portfolio you saved or an account you customized. If accessed from `Overview`, select the client's current account in step 1 and then the target portfolio or account you wish to reallocate to in step 2. Read more about the workflow here <https://www.wealthscopeadvisor.com/compare>.
3. **Stock Concentration:** for identifying concentration risks in client portfolios. With this tool you can assess stock concentration across multiple accounts. In the bottom table, click the magnifying glass icon to see where each top 10 holding by concentration is held.
4. **Stock Exposure:** select any Canadian/U.S. stock and see in which account it is held directly or indirectly within a mutual/exchange-traded fund.
5. **Assign (Advisor View only; not available in Client View):** in an account in the Advisor view, click 'Assign' to attach this account to a specific client. A use case of this feature is for Advisors who have used their own Wealthica account to link custodial accounts for multiple clients. The account will now show up in the assigned client's view.

Many of the functionalities in Accounts are also available in the Household setting, such as the Scorecard, stock concentration, and stock exposure. Create a household in Client Management, and then click the 'house' icon of any household member to enter the household view.



3.2 Portfolios

There are several portfolio builders designed for your research in the Portfolios segment. Select "Create a New Portfolio".

- **DIY Portfolio Builder:** A quick way to test portfolio ideas by inputting any Canadian and U.S. stocks, ETFs, and Canadian mutual and segregated funds (except private funds) using their tickers/fund codes and corresponding weights. You can also allocate weights to Bitcoin and/or Ethereum here to see their impact.

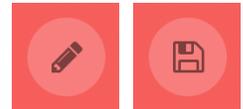
The following portfolio builders are developed by Wealthscope (hence the logo next to their names):

- **ETF Portfolio Builder:** Pick your own asset mix from different asset classes. You can see the ETFs that track each asset class by clicking the "View ETFs" button. This is an excellent place to build benchmark or core portfolios.

- **SmartRisk Portfolio Builder:** Machine learning is leveraged to generate ETF model portfolios for tactical asset allocation, using 32 asset categories. You can use it to optimize specific risk exposures, including human capital. These models are perfect to use as customized core portfolios. Like the ETF Portfolio Builder, click the “View ETFs” button to see the list of ETFs.
- **Asset Allocation Using Machine Learning Builder:** Input your desired holdings and use a technique called Hierarchical Risk Parity (HRP) to determine the optimal portfolio weights to achieve diversification. (Note: Holdings must have at least 3 years of history.)
- **Efficient Frontier Portfolio Optimizer:** A classic for investment professionals but with some added features. Use this tool if you have a list of securities you want to invest in and want to optimize the weights. You can generate a Wealthscope Portfolio Scorecard for every portfolio you optimize.

Notes:

- Once you have built a portfolio, you will receive a [Wealthscope portfolio scorecard](#).
- You can **edit/save** these portfolios using the icons on the left panel of the Wealthscope Portfolio Scorecard. Once saved, you can use them to compare against your actual investments or against other saved portfolios (using the ‘Compare’ function in the Scorecard, which is the “Scale” icon on the left), or for use in **PLANNING** to simulate returns.



Note: To use the portfolio simulation feature in our **PLANNING tools, you should save your model portfolios (for 5 risk profiles) first.**

- Click ‘See Saved Portfolios’ to see portfolios saved from portfolio builders. In the Advisor view, you have the option to toggle a saved portfolio to make it an advisor’s ‘Model Portfolio’. These portfolios will then appear for all clients in their ‘See Saved Portfolios’, and importantly, available for use in the **PLANNING** segment to simulate returns and for portfolio comparisons.

3.3 Planning

There are tools crafted separately for the accumulation and the decumulation phases of retirement planning. The Target Saving tool in **Accumulation** is multi-purpose and can be used for general financial goals, such as saving for a child’s education. Some of the tools are also extremely useful in supporting your narrative when you are recommending a portfolio to a client. You can show them how different portfolio options impact how much they need to save, or whether they are at risk of outliving their savings.

3.3.1. Accumulation

1. Select **Retirement Blueprint (Pro Edition Users Only)** to help your client complete a 4-part questionnaire to:
 - i. Calculate annual spending needs net of expected retirement income such as pension benefits.
 - ii. Determine your client's **Target Wealth** at retirement, which is the desired size of their nest egg. For this step, you need to first create 5 model portfolios for different risk profiles. These are portfolios your client will be drawing down their savings from once they are retired.
 - iii. Determine your client's **Target Saving**, which is the monthly saving required from now until retirement to achieve their Target Wealth. For the simulations, you can choose one of your models or a portfolio you have saved previously for the client. Once a likelihood of success is selected, Wealthscope provides a "Simulated Saving Outcomes" chart to help your client visualize the expected outcomes of their assumptions.
 - iv. The Blueprint is best suited for clients that have RRSP and TFSA contribution room. In 2025, the maximum combined contribution room is $\$32,490 + \$7,000 = \$39,490$ for the calendar year. This is equivalent to saving $\$3,291$ per month. If the contribution room is exhausted and part of the savings are held in a non-registered investment account, the Blueprint will calculate the expected taxes owing for the coming year. This amount (if any) represents the extra savings required and future amounts will change with your client's income tax bracket and contribution room.
 - v. Under Summary, you will see the summarized results of the Retirement Blueprint. It includes context boxes that display adaptive insights to help you extract more actionable information from the financial plan.
 - vi. Save the blueprint at the bottom of the Summary page. Once saved, you can edit and change scenarios directly from the Blueprint. You can also download the blueprint as a PDF.

3.3.2 Decumulation

1. Select "Portfolio Longevity" to see how long your client's savings will last in retirement, versus their conditional life expectancy, using different investment options. This is a great tool for lead generation and to explain the idea of longevity risk.
2. Select "Probability of RUIN" to estimate the probability that you will outlive your retirement savings based on your current circumstances and withdrawal rate.

3. Select “Optimal Drawdown” ([Pro Edition Users Only](#)) to see how much a retiree can afford to spend each year with their savings and retirement income, and from which sources, such that taxes are minimized and a smooth lifestyle is maintained. The assumptions and how this tool works are described at the top.
4. “Optimal Drawdown with Target Spending” ([Pro Edition Users Only](#)) is for retirees who have an annual spending amount in mind and are not at risk of outliving their savings. This tool shows how to drawdown savings from various sources in order to minimize taxes. You will see a comprehensive breakdown of retirement income sources, tax burden, and investment account projections over their planning horizon.

3.4 Tools

Wealthscope also provides useful tools to help you better understand your investments and complete investment research so you can make informed decisions. Navigate to the Tools tab to see the tools available.

Stock Exposure Lookup - Complete a reverse lookup of your exposure to any stock across all of your accounts in Wealthscope. Click the blue bars to see a breakdown of your direct and indirect exposure. You can also toggle to see your exposure expressed in a “%” (percentage of all accounts) or “\$” (actual dollar amount). This tool is also accessible from Accounts -> Overview.

Stock Concentration - for identifying concentration risks in client portfolios. With this tool you can assess stock concentration across multiple accounts. In the bottom table, click the magnifying glass icon to see where each top 10 holding by concentration is held.

Fund Lookup - Search for key facts and other pertinent information about any North American ETFs or Canadian Mutual Funds. Enter the Fund Code/Ticker or name of the fund in the search bar to see the fund facts, historical performance, the fund breakdown and the top 10 holdings in the fund. For bond funds, Wealthscope will also display the Credit Quality of the holdings.

Fund Comparison - Compare up to 4 North American ETFs or Canadian Mutual Funds in a side-by-side comparison table. Enter the Fund Code/Ticker or name of the fund to add them to your comparison. Fund Comparison has 6 key sections: Key Facts, Fund Growth, Annual Returns, Breakdown, Top 10 Holdings, and Fund Metrics. Use this tool to compare funds and decide between funds with greater precision.

Correlation Matrix - Estimate the correlation amongst a set of up to 5 securities to see how closely they move together over time. Simply enter the Ticker/name of the fund into the search bar to start adding them to the Correlation Matrix. This tool is great for investors looking to improve diversification

in their portfolios, and ultimately minimize portfolio risk. If a correlation coefficient is closer to +1, including both assets in the portfolio will not be effective in lowering risk.

OAS Estimator - Use this tool to estimate the amount of Old Age Security benefits you will receive in retirement.

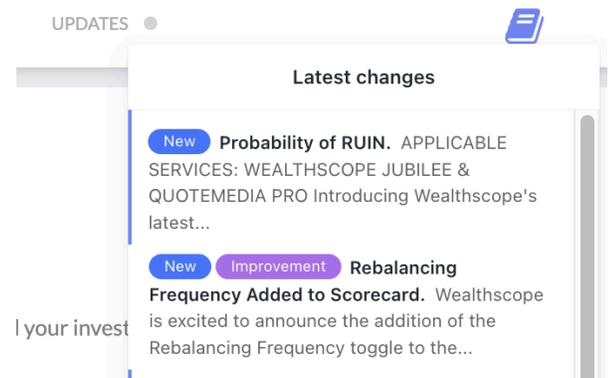
CPP Estimator - Use this tool to estimate the amount of Canada Pension Plan benefits you will receive in retirement.

Charting Tool - Search for a ticker/name to start charting the growth of up to 5 securities and compare their historical returns over time. The chart will go back as far as the longest *common* history of the securities you have charted. Click the 'Portfolio' (folder icon) to add portfolios you have saved in the **PORTFOLIOS** segment to the chart.

Fund Allocator - Use this tool when setting up a new investment account. Tell Wealthscope how much you plan to invest, and the allocation (%) to each security you want to invest in. We'll calculate how many shares of each holding you should buy to achieve your target portfolio.

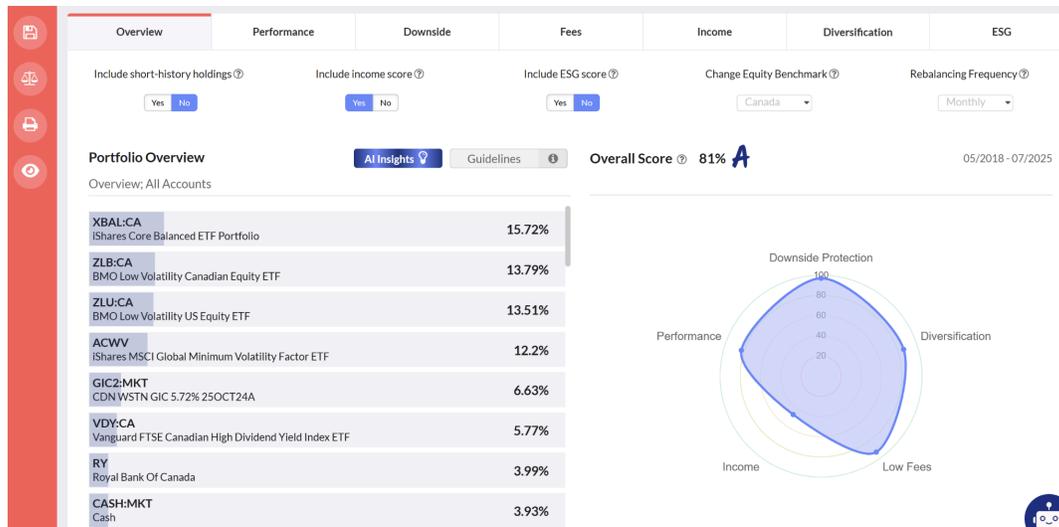
3.5 Updates

Click the 'Updates' tab to see Wealthscope's newest features and latest improvements. When a new update has been applied, you will see a red notification beside 'Updates'. Click on a heading to view the full update. Click 'Wealthscope for Advisors Updates' at the bottom of the updates list to view Wealthscope's full changelog.



4. Wealthscope Portfolio Scorecard

A portfolio will be given an overall letter and percentage grade, as well as graded on **6** important portfolio dimensions: **risk-adjusted performance, downside protection, diversification, fund fees, income, and ESG**. Click on any letter grade in the Portfolio Scorecard to see a short article about why and how we score portfolios. The Overall Score is a simple average of all the dimension scores.



Hide/show scores: The decision is yours. You can set your global preference and hide the scores whenever you analyze and land on a scorecard. In the Advisor View, go to your name (top right) -> Profile -> Scorecard Settings. You can always show the scores on the fly by clicking the ‘Eye’ icon on the left panel of the Scorecard.

4.1 Control Panel

The control panel allows you to customize your scorecard.

i. Include Short-History Holdings / Replace

Wealthscope scores a portfolio in each dimension based on how well the portfolio has performed during the specific time period in question. The period is dictated by how far the securities go back in history. If the securities are relatively new, they may be filtered out (see “Guidelines” to learn more) and displayed with a red outline. To accommodate these holdings, you can replace them with a proxy by clicking the **two-way arrow** to access the “Replace” function. Alternatively, toggle “Include Short-History Holdings” to “Yes” in the top control panel to override the guidelines. If included, short history holdings can potentially skew the analysis and the Scorecard should be interpreted with caution.



See this [webpage](#) for a list of newer passive Canadian-listed ETFs and CDRs that have been backfilled by Wealthscope, for the purpose of a more holistic portfolio analysis. As a result, the history of these securities in the Portfolio Scorecard will go back farther than their respective inception dates.

ii. Include Income Score

The default is YES, meaning that the income score is included in the calculation of the Overall score. You can toggle to NO to exclude it if income is not an important goal for the portfolio.

iii. Rebalancing Frequency

By default, the Scorecard assumes the portfolio will be rebalanced to its current weights each month. The “Rebalancing Frequency” toggle allows you to dynamically change the default assumption to “Quarterly” or “Annually” and generate an analysis that more accurately matches your investment strategy.

iv. Change Equity Benchmark

Your portfolio is analyzed against a benchmark for Performance and Downside Protection, which is selected automatically depending on which one of the 11 asset allocations your portfolio is closest to (100% equity, 90% equity 10% fixed income ... to 10% equity 90% fixed income, 100% fixed income). The default equity portion of the benchmark is the S&P/TSX Capped Composite ETF, but you can choose a global equity index instead (see dropdown at the top-right of Overview page). Or, you can create a **custom benchmark**.

To save a custom benchmark for *all* clients, do it in any scorecard in **Advisor** View.

v. Include ESG Score

Wealthscope partners with **Owl Analytics** to bring you ESG scores for each of your holdings as well as your portfolio as a whole. The default of this toggle is set to NO. You should always check the ESG coverage for the portfolio’s holdings first by clicking on the ESG tab at the top, before including the ESG score in the Overall Score.

4.2 Dimension Scores

Click on each tab at the top of the scorecard to see the details for each dimension.

i. Performance – an evaluation of past performance based on risk-adjusted returns as well as annualized returns relative to the benchmark, which is a portfolio of two index ETFs that has a similar asset allocation of stocks and bonds to your portfolio. A higher score is more desirable.

ii. Downside Protection – an evaluation of the portfolio’s ability to limit losses when there is a stock market downturn. Downside capture, maximum drawdown, and downside risk relative to the benchmark portfolio are used for this score. A higher score is more desirable.

iii. Diversification – an evaluation of your portfolio’s ability to diversify risk, scored in terms of the portfolio’s weighted average pairwise correlation and the following three dimensions, across regional stock markets, macroeconomic factors, and global business sectors. A higher score means that your portfolio’s risk exposures are more spread out. A higher score is more desirable.

iv. Fund Fees – an evaluation based on your portfolio’s weighted average management expense ratio (MER). MER is a fee charged by ETFs and mutual funds. Depending on the series (e.g., A), it may include a trailing commission that compensates the advisor who sold the fund. Note that fund returns are reported net of MER. Additional advisory or trading fees are not included in this score. When a MER is unavailable for a given fund, it will be replaced by the category average; this will be indicated in a message to the right of the MER value. A higher score indicates lower fund fees, which is more desirable. The maximum is set at 3%, meaning that a portfolio with a MER of 3% or more will receive a score of 0%.

v. Income – this refers to income such as dividends and fund distributions. It is the weighted average yield of the portfolio. The maximum is set at 5%, meaning that a portfolio with a yield of 5% or more will receive a score of 100%. A higher score represents a higher income yield. Depending on your client’s needs at their current life stage, they may or may not be looking for income from their investments.

vi. ESG - ESG ratings for stocks and funds are powered by OWL Analytics, a big data analytics firm specializing in ESG research. Note that ESG ratings are not evenly distributed. For example, very few stocks and funds have ESG ratings above 80 on a 0-100 scale currently. Wealthscope takes this into account and rescale the ratings when grading the ESG dimension of the portfolio. Please note that not all holdings have ESG coverage.

Note: The analysis goes back to April 2007 only because the global sector risk attribution analysis under the Diversification tab uses global sector ETF data, and the earliest common inception date for these ETFs was in early 2007.

AI Insights: Craft a narrative with clients in less than 60 seconds using AI insights. It is generated based solely on your Wealthscope Scorecard. This tool uses an OpenAI large-language-model (LLM) to summarize your Scorecard and provides high-level strategic enhancement ideas. Your Scorecard is deleted right away and no data will be stored by OpenAI.



Disclaimer: The Wealthscope Portfolio Scorecard is based on an objective, data-driven evaluation of each portfolio dimension. It provides a useful tool for analyzing and comparing portfolios within the same risk category or asset allocation to help you identify opportunities for further research. It should not be considered recommendations to buy or sell individual securities or portfolios. And the usual disclaimer applies – past performance is not necessarily indicative of future performance.

5. Portfolio Proposals

Perform a side-by-side comparison of your recommendation with the client's current investment account. Add up to two additional portfolios, benchmarks, or accounts. The Proposal is a streamlined tool that presents the essential metrics and charts and it is presentation ready. Proposals are also available for grouped accounts. Start from your client's account(s) and then hover to "More" in the top right.

6. Risk Profile / Monitoring

Using a risk profile questionnaire (ours, CIRO's, or your own), you can select and save one of five risk profiles for each client in Wealthscope. Further, you can monitor the riskiness of each client's investment account(s), updated daily. Should the riskiness fall outside of the interquartile range for the client's risk profile, there will be an alert on the landing page when you sign in. This tool can be found in Client View -> Profile -> Risk Profile.

Client Management

View or edit the accounts, portfolios, blueprints, and more of an individual client.

⚠️ 6 clients are outside their target risk range. Enter here to view.

7. Prospecting Tool

Pro Edition users receive a complimentary, digital lead generation tool which can be easily integrated into their marketing website. To learn more, please visit <https://www.wealthscopeadvisor.com/pricing>.

To begin setting up your Prospecting Tool, get in touch with our team at contact@wealthscope.ca.

8. FAQs

How do I remove a client?

Enter the **Client** view of the client you wish to remove. Hover over their name at the top right corner and click 'Profile' in the dropdown. Here, you will be able to remove a client. Alternatively, you can remove a client in Client Management.

What to do if the account information linked through Wealthica is out-of-date?

There are two types of connection errors you may experience that can result in out-of-date information:

1. A syncing error due to Wealthica's connection issues with the financial institution in question. Wealthscope will display a warning message on the relevant account. This requires the Wealthica account owner to take action on Wealthica's site. Once the issue is resolved on Wealthica's site, it will be reflected on the Wealthscope Advisor platform.
2. The token that links Wealthscope with Wealthica for a specific client has expired. Simply re-link their Wealthica account on the Wealthscope Advisor platform to resolve this issue. Note: the token expires every 12 months for your client's protection.

Am I able to customize the PDF exports to display my firm's logo?

Coming soon (mid-November 2025). Check Advisor view -> Profile.

How do I delete an investment account?

You can only delete AI uploaded or manually-entered accounts. Go to the account you wish to delete. At the bottom of the holdings table, there is a 'Delete' button. Once an account is deleted, it cannot be recovered.

How do I edit the positions or weightings in an account?

You can only edit the positions and/or weights of AI uploaded or manually-entered accounts. Go to the account. At the bottom, there is an "Edit" button. Remember to save your changes.

How can I ensure the security of my clients' data?

The Wealthscope platform has gone through rigorous vulnerability assessments and we use bank-level security to protect the information we collect. User data is stored in Canada on Amazon Web Services (AWS) servers and is encrypted using the AES-256 algorithm. All passwords are hashed (meaning not even we can tell what it is!)

9. Icon Legend

Icon	Functionality	Where
	Click the multiple-person icon found on the left navigation bar to enter Client Management.	In the left panel when in the Advisor View.
	Click the individual person icon found on the navigation bar to the left to enter the Advisor view.	In the left panel when in the Client View.
	This icon opens a new window in your browser and links to the Getting Started Guide.	In the left panel
	Click the pencil icon on the left red navigation bar when viewing a Portfolio Scorecard to edit the asset allocation or positions of a portfolio from the portfolio builders.	In the left panel of Portfolio Scorecards from a Portfolio Builder in the Portfolio segment.
	Click the disc (save) icon found on the left red navigation bar when viewing a Portfolio Scorecard to save an account as a portfolio or to save a portfolio.	In the left panel of Portfolio Scorecards.
	Click the scale icon found on the red navigation panel when viewing a Portfolio Scorecard to compare an account or portfolio with previously saved portfolios.	In the left panel of Portfolio Scorecards.
	Print / save a PDF of the Portfolio Scorecard.	In the left panel of Portfolio Scorecards.

	Hide or show Wealthscope scores (letter grades and percentages) on the fly.	In the left panel of Portfolio Scorecards.
	Click the yellow house icon to enter a previously created 'household' while in the Client Management workflow.	In Client Management.
	Click the sticky note to the right of the client account's name to add a note to a specific client-account.	At the top of an individual investment account.
	Click the YouTube play button to view our multimedia educational content on YouTube; explaining financial concepts with simple videos	In multiple places within the Portfolio Scorecard.
	When you see a red exclamation mark to the right of a holding in the Scorecard, this means the security has been excluded in the analysis because it has insufficient history or other errors	In the Portfolio Scorecard, next to a holding.
	Click the two-way arrow to the right of a specific holding in the Overview tab of the Scorecard to 'Replace' a holding that has been excluded in the analysis with a proxy security instead.	In the Portfolio Scorecard, next to a holding.
	The yellow exclamation mark on an individual account tab means that one or more weights exceed their maximum deviation in its rebalancing model, or when holdings have been sold or added.	On an account tab.
	The intersecting arrow icon on an individual account tab indicates that a rebalancing system has been set up for an account	On an account tab.

	<p>The link icon on an individual account tab indicates that account syncing with financial institution has failed</p>	<p>On an account tab.</p>
	<p>Click the bot bubble in the bottom right of every Wealthscope page to use the Wealthscope AI Assistant to ask questions about the application.</p>	<p>Bottom right of every page.</p>

10. Grading Scheme

A	80 - 100
B	70 - 79
C	56 - 69
D	21 - 55
F	Below 21

Need help?

This guide only serves as an introduction. If you need further assistance or would like to have a demo via Zoom, please contact Wealthscope at contact@wealthscope.ca.