

OLA Portal First Time Login Guide

The OLA portal will allow investors to transact in their account(s). In addition, investors will be able to access account level information such as statements, balances, and history. Only one person per account/organization will be granted access to the OLA portal. All others who need access to view account level information will need to register for the FundsAUM portal. For access to FundsAUM please refer to the [FundsAUM Designation Form](#) located in the [CBIS Funds Transformation Tool Kit](#).

On December 6, 2021, investors will be able to login. Visit the Investor Services page on the www.cbisonline.com on December 6 and click on the OLA button to access the portal.

INFORMATION YOU WILL NEED TO GAIN ACCESS FOR THE FIRST TIME

- Account Number
- Tax Identification Number
- Email Address
- Zip Code

HELPFUL TIPS

- Account number can be obtained from your statements. Only enter numbers, no leading zeros, no hyphens, or spaces.
- If the primary address is a non-US address, leave the zip code blank and check the box under the zip code field.
- User ID can be between two and 20 characters
- Password MUST be at least eight characters, contain upper and lower case letters, contain at least one number and have one of the following special characters: ! # \$ %
- The question mark in each field opens a pop up window with additional information.
- After the registration is complete, you will be directed back to the login page to enter your new login credentials.

Please note: You will not be able to access OLA portal until December 6, 2021

Need help? If you have questions prior to December 6, please call your CBIS representative or Investment Concierge. On December 6, 2021, please call 1-866-348-6466 (toll-free) to speak with a representative who can assist you.