MACKENZIE
Investments

AdvisorAccess

Register in just 3 simple steps

Steps to register

1 Call our Client Relations team

Contact our Client Relations team at 1-800-387-0614. We will set your account up in our system and email you a link to complete your registration.

2 Verify your identity

After clicking the link to register, enter your dealer rep code to confirm your identity.

3 Complete registration

Set up your password and security questions, then click “**Complete registration**”.

KEY FEATURES

Instant access to your clients’ account information.

View and download client documents, such as tax slips, statements and trade confirms.

Generate customized or standard reports.

Congratulations – you’ve successfully registered for AdvisorAccess!

Sign in anytime to view your clients’ account information.