



Canadian Securities
Administrators

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en valeurs mobilières

Retrieving Existing Profiles

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This document is designed as a quick reference guide.

For complete step-by-step instructions, please refer to the [SEDAR Filer's User Guide](#)

Section 2.7: Searching for Profiles

Retrieving Existing Profiles

This quick reference guide provides information on how to retrieve profiles from the SEDAR server by creating and submitting customized inquiries using the Search Profiles module.

Note: There is a number of criteria to choose from when building a customized search inquiry however, we recommend using the Profile Number whenever possible as it is a unique identifier and will reduce your search time.

1. Open Search Profiles

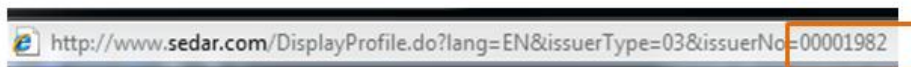
- At the bottom of the window, click New Inquiry
- In the Inquiry Name field, name your inquiry (Ex: Search1)
- In the Description field, enter information to describe the inquiry (Ex: Profile Number)
- In the Profile Type field, always specify what type of profile you are searching for: Other Issuer, Investment Fund Group/Investment Fund Issuer, Other Filer

Note: For this example, we have selected Other Issuer. Please see the Additional Instructions section below for additional details when searching for Investment Fund Group/Investment Fund Issuer or Other Filer profiles.

- In the List of Fields to Search On, scroll down to find Profile Number and click on it
- Select (=) as the Operator
- In the Criteria field, enter the profile number you wish to search for excluding the leading zeroes

Note: A company's Profile Number can be found on SEDAR.com under the [Issuer Profiles](#) tab

- Select the applicable listing (Companies or Investment Fund Groups), click on the first letter of the Company name (Ex. For SEDAR Ltd, click on the letter S)
- Locate the company and click on the name to open their profile
- Once the company profile opens, look for the Profile Number in the address bar at the top of the page
- In the example below, the Profile Number is 00001982



- Once you have entered the Profile Number in the Criteria field (without the leading zeroes), click Add and View (Do NOT click OK)
- Click Submit. Your inquiry is saved to your Search Inquiries list

2. When the working window disappears, click Open Report at the bottom of the window

- Profiles that match your criteria will display in the Filer Profile Report Viewer window

Note: Your search results may contain additional profiles which begin with an asterisk. These profiles are related to profiles that match your inquiry criteria through a previous profile relationship. For more information on Previous Issuers, please see Section 6.4 (c) of the [SEDAR Filer Manual](#)

- Highlight your profile and click Open Profile
- On the next window, click Transfer to move the profile into your local Profile Management
- SEDAR will prompt you with a message confirming the transfer was successful

Additional Information

Retrieving multiple profiles

To search for more than one profile number at a time, insert a semi-colon (;) between each profile number – no spaces required

- The profiles will all need to be of the same profile type
- You will still need to transfer them one at a time into your Profile Management

Retrieving Investment Fund Group/Investment Fund Issuer

Searching for an Investment Fund Group/Investment Fund Issuer profile is very similar to a search for an Other Issuer profile however, it is a two-step process. The search for the Investment Fund Group profile must be completed first. Once the Investment Fund Group profile has been successfully added to your profile management, you can then complete the search for the Investment Fund Issuer profile(s).

- Note: When searching for an Investment Fund Group, you will need to select Investment Fund Group Number from the List of Fields to Search On instead of Profile Number.

Retrieving Other Filer profiles

Searching for an Other Filer profile is very similar to the process for an Other Issuer profile however, Other Filer profiles are private not public and as a result, you may not be able to find it using a Profile Number search or by any other search criteria.

- Please contact the CSA Service Desk at 1-800-219-5381 for assistance with searching Other Filer profiles.