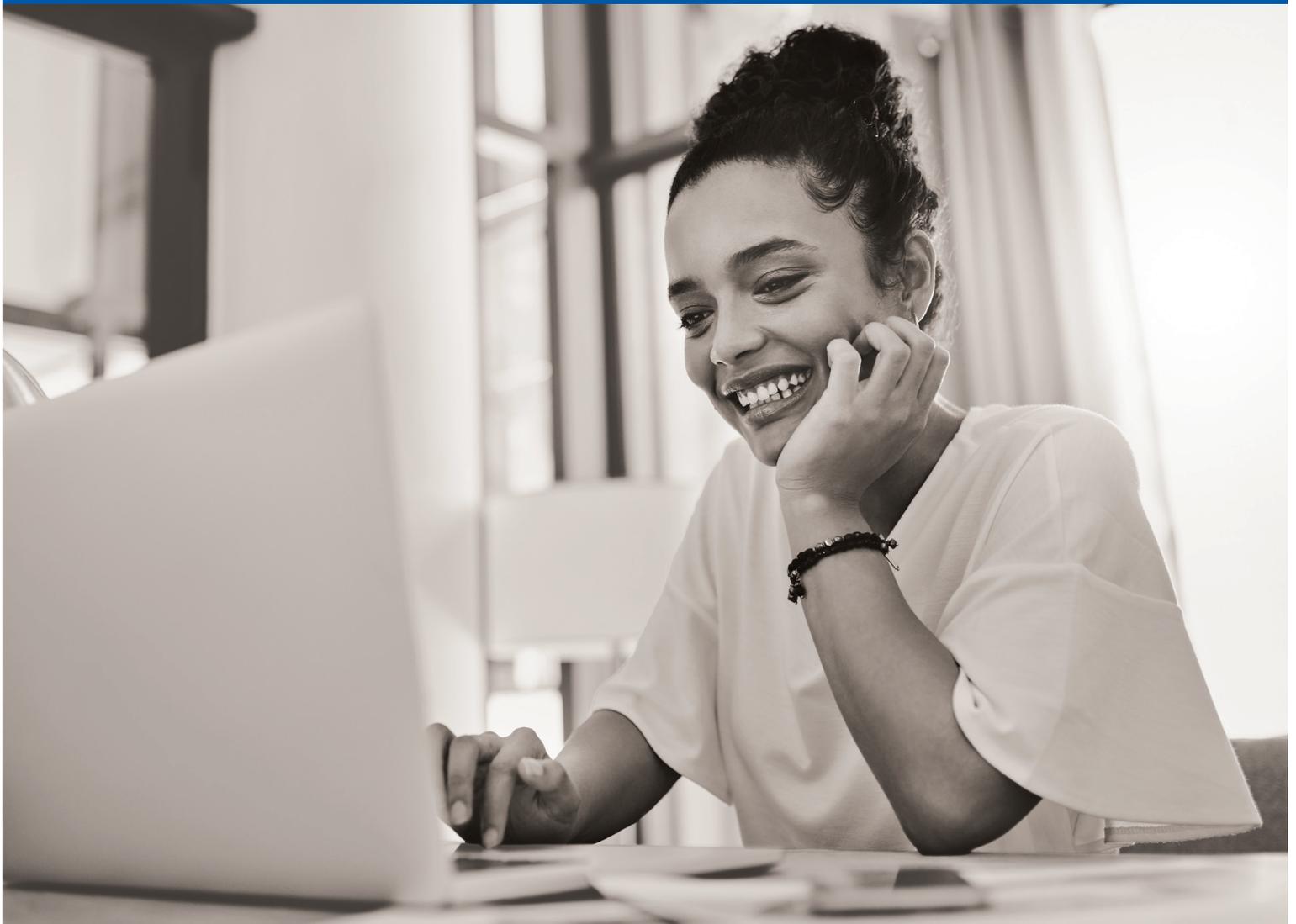
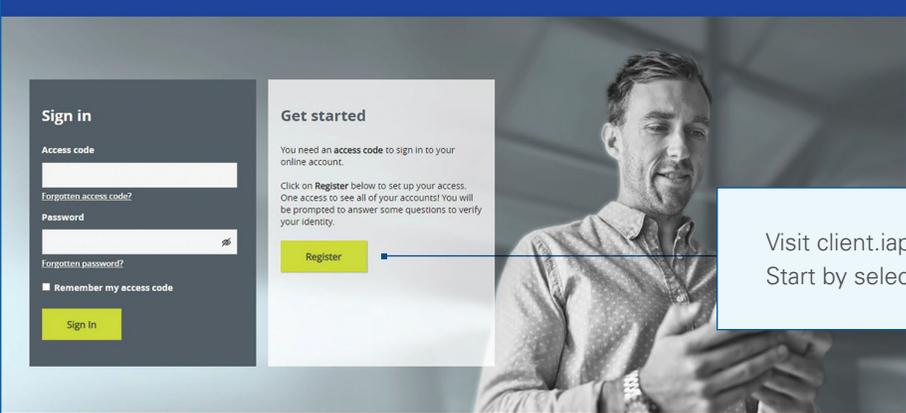


# Client Portal self-registration guide



# Registering and setting up your access

## Register your account



Visit [client.iaprivatewealth.ca](http://client.iaprivatewealth.ca).  
Start by selecting **Register**.

## Registering as a client

A screenshot of the 'Register as a client' form. The form is titled 'Register as a....' and has a 'Client' tab selected. It contains fields for 'First name', 'Last name', 'Date of birth', 'Country' (with radio buttons for 'Canada' and 'International'), 'Postal Code', and 'Client ID'. There is a checkbox for 'My address does not have a postal code' and buttons for 'Continue' and 'Cancel'. A blue callout box points to the 'Last name' field, and another points to the 'Client ID' field.

Provide the required information as it appears on your investment portfolio statement.

Input your **Client ID** found on your (investment portfolio) statement or ask your advisor.  
Have more than one Client ID? Choose any one of your Client IDs and your other accounts will be automatically consolidated.\*  
\*Except for corporate accounts

## Setting up security

**Some security basics**

Email  
investor@email.com

Personalized access code <sup>?</sup>  
Investorclient

Password <sup>?</sup>  
••••••••

Password confirmation  
••••••••

**Security questions**  
Should you have trouble logging in, these security questions will be used to assist you. <sup>?</sup>

Question no 1  
Choose... ▾

Answer no 1  
\_\_\_\_\_

Question no 2  
Choose... ▾

Answer no 2  
\_\_\_\_\_

Question no 3  
Choose... ▾

Answer no 3  
\_\_\_\_\_

I accept [the terms of use.](#)

Continue

To register an account, you will need to provide an email address, choose an access code and a password. Your **access code** must be:

- Unique and from 8 to 15 characters
- Different from your password
- Different from other personalized access codes

Your access code can be changed at any time in the account configuration section. Click on “?” for more information.

Your **password** must contain between 8 and 15 characters, including at least 3 of the following: lowercase letters, uppercase letters, numbers and special characters (e.g., \$, %, @, !). Your password cannot be your access code.

Select 3 security questions to be able to reset your **access code** or **password** later.

**Your account has been successfully created!**

 Your access code is now: Investorclient

**What you should do now**

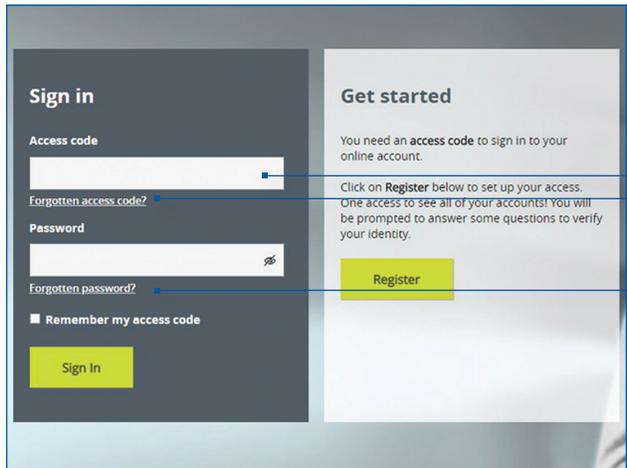
- Note your access code for future use
- Log on to our secure website
- Review and update your personal information

LOG IN

Click on **LOG IN** to return to the registration page and login using your newly created credentials.

An email confirming your registration will be sent to the email address provided in this registration process.

## Signing in

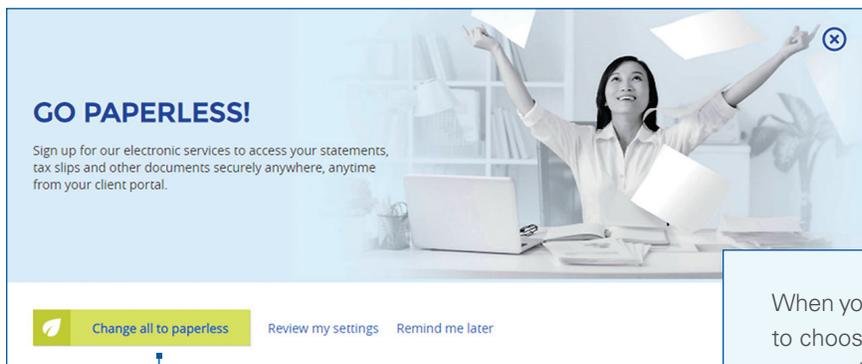


The screenshot shows a sign-in interface with two main sections: "Sign in" on the left and "Get started" on the right. The "Sign in" section includes fields for "Access code" and "Password", with links for "Forgotten access code?" and "Forgotten password?". There is also a checkbox for "Remember my access code" and a "Sign In" button. The "Get started" section explains that an access code is needed and provides a "Register" button. Callout boxes provide additional instructions: one points to the "Access code" field and the "Register" button, and another points to the "Forgotten access code?" and "Forgotten password?" links.

Enter your **access code** or the **email** address you used during the registration process.

If you forget your **access code** or **password**, click here to securely reset them.

## Registering for electronic services



The screenshot shows a banner titled "GO PAPERLESS!" with a background image of a woman celebrating at a desk. The text below the title says: "Sign up for our electronic services to access your statements, tax slips and other documents securely anywhere, anytime from your client portal." At the bottom of the banner are three buttons: "Change all to paperless" (highlighted in green), "Review my settings", and "Remind me later". A callout box points to the "Change all to paperless" button.

When you first login, you will be prompted to choose between receiving your documents electronically or in paper format.

This option may be changed at any time under the **Settings** section.

If you have questions or require more information, please contact your Investment Advisor.

iA Private Wealth offers tailored wealth management solutions through a network of more than 500 independent Investment Advisor teams. With over \$40 billion in assets under administration, we are the partner of choice for discerning investors across Canada.

**INVESTED IN YOU.**

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