Client Portal Self-Registration Guide

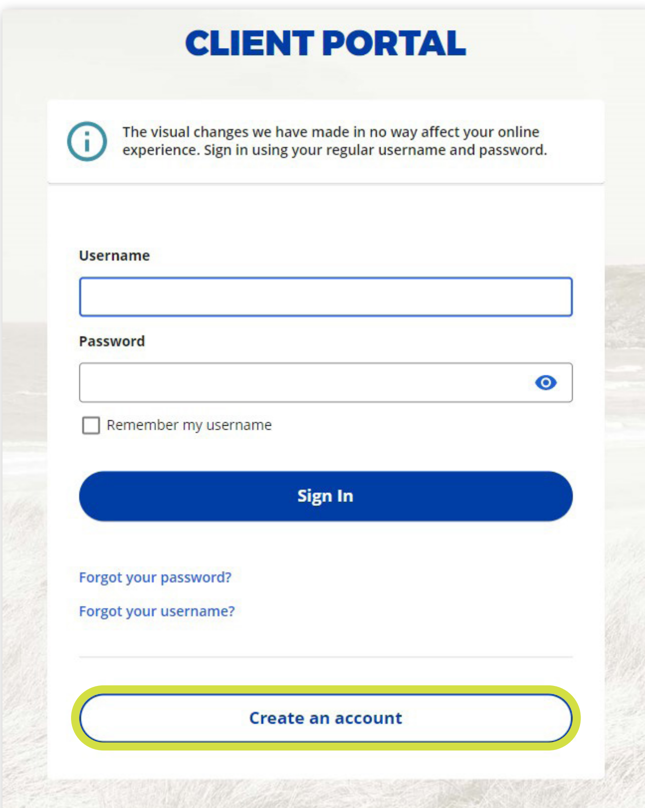
iA Private Wealth™

This guide will show you how to register for the iA Private Wealth Client Portal, where you can review your portfolio, access your documents and interact with your advisor.

If you have individual accounts, please follow the steps below to register and set up your access.

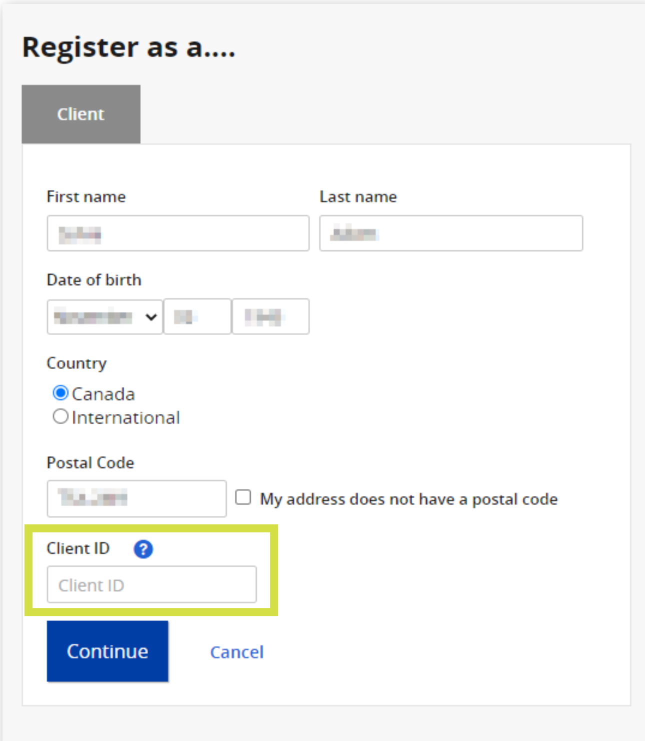
If you only have a corporate or trust account, please contact our Client Support team at 1-866-384-5840 for assistance with setting up your Client Portal profile.

Registering and Setting Up Your Access



Visit iaprivatewealth.ca. Click on **Sign In** and use the **Create an account** button.

Registering as a Client



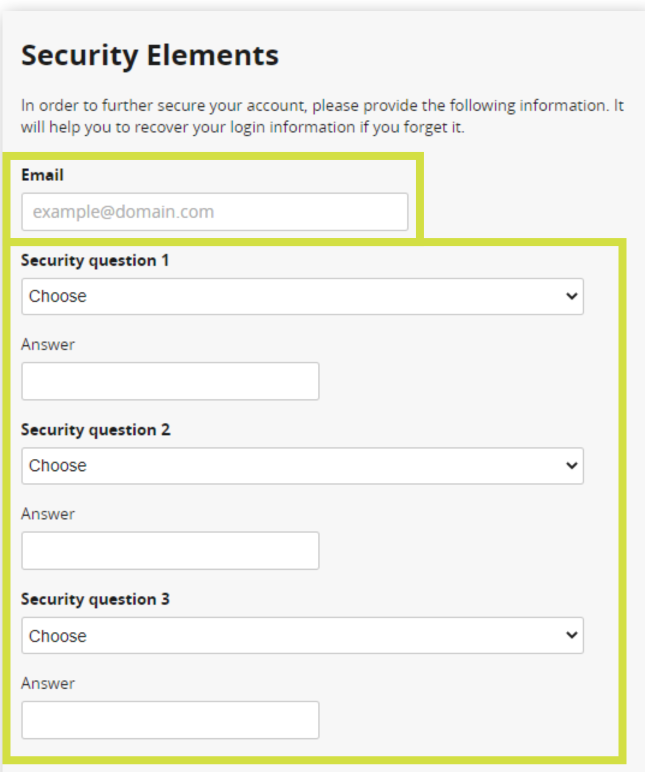
Provide the required information as it appears on your investment portfolio statement.

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.

To link your corporate account, please contact our Client Support team at 1-866-384-5840.

Setting Up Security



To register an account, you will need to provide an **Email** address.

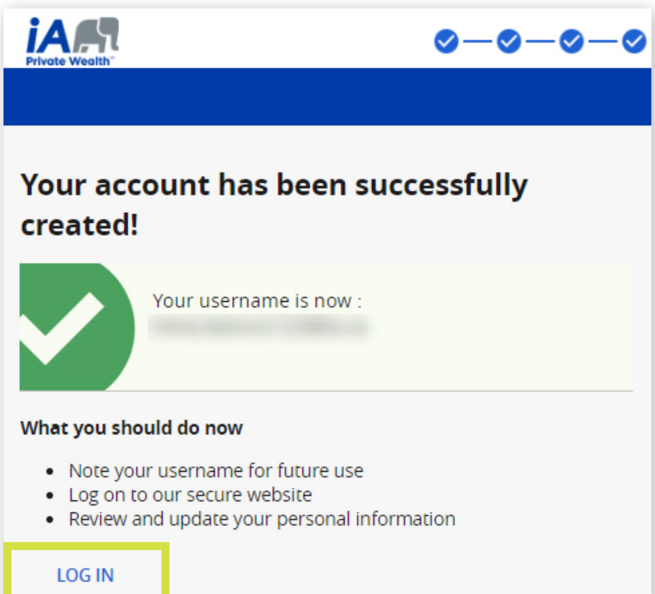
Select 3 security questions to be able to reset your **Username** or **Password** later.

Choose a username and a password.
Your **Username** must be:

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

Your username can be changed at any time in the account configuration section. Click on **?** for more information.

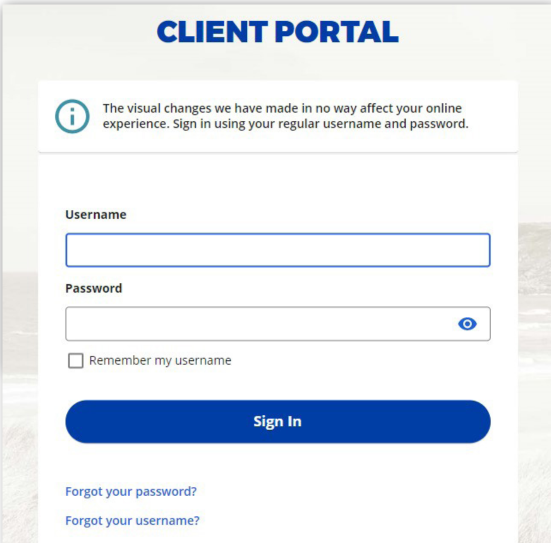
Your **Password** must contain between 8 and 15 characters, including at least 3 of the following: lowercase letters, uppercase letters, numbers and special characters (e.g., $, %, @, !). Your password cannot be your username.



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

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

Signing In

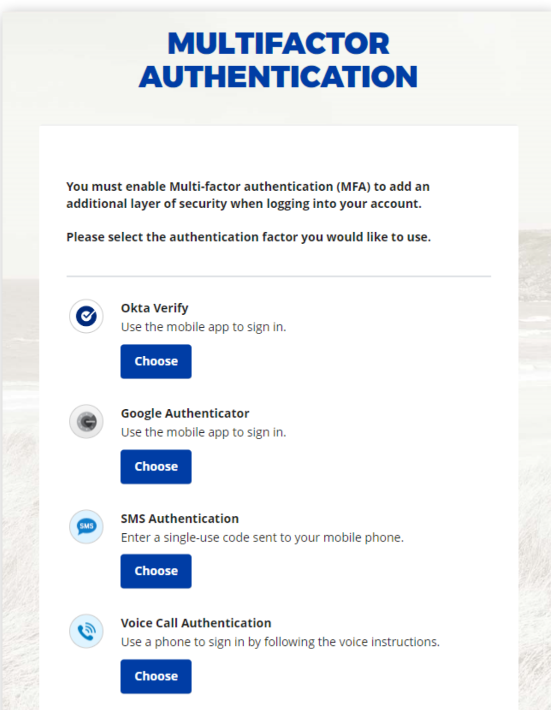


Enter the **Username** you used during the registration process.

If you forget your username or password, click **Forgot your username/password?** to securely reset them.

Multi-Factor Authentication

When you first sign in, you will be asked to select your Multi-Factor Authentication method. Please select one of the four multi-factor authentication methods available to make your account information more secure.



1. Text message (SMS) authentication

Using your cell phone, you can authenticate yourself by entering a unique security code that you will receive via text message when accessing the Client Portal. To learn more about this authentication method, click here.

2. Voice call authentication

You can authenticate yourself by entering a unique security code that you will receive via voice call to your mobile or landline phone when accessing the Client Portal. To learn more about this authentication method, click here.

3. Google authenticator app

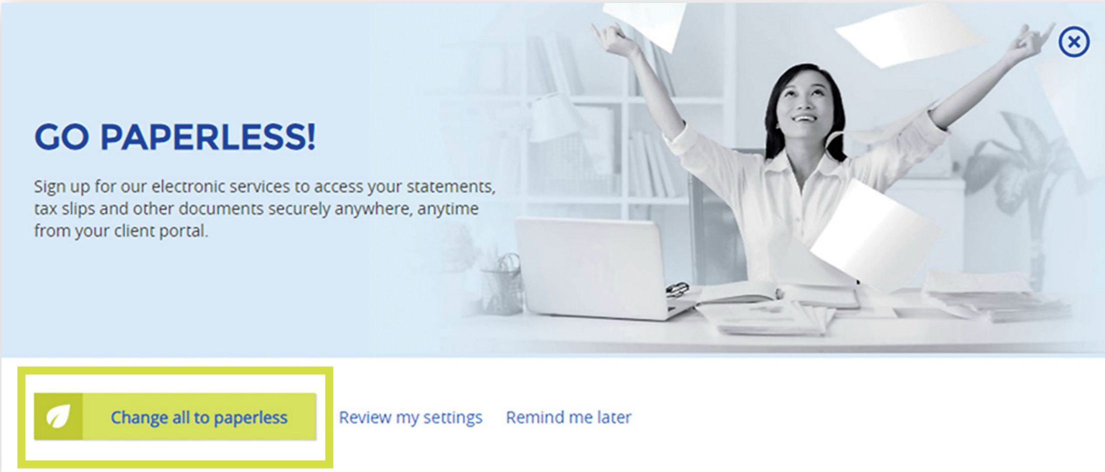
This app can be downloaded to your iPhone or Android mobile device and allows you to generate a unique security code to access the Client Portal. To learn more about this authentication method, click here.

4. Okta verify app

This app can be downloaded to your iPhone or Android mobile device and allows you to generate a unique security code to access the Client Portal. To learn more about this authentication method, click here.

For more information about Multi-Factor Authentication, please click here. After setting up your preferred method of authentication, click on **Finish**. This will take you to the Client Portal.

Registering for Electronic Services



The first time you sign in to the Client Portal, 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 wish to receive your documents electronically, click on **Change all to paperless**. A window will open with a 3-step process where you'll be able to consent to electronic delivery of all documents.

After consenting to electronic delivery you will see a confirmation message about your changes. Click on **Back to your overview page**.

You are now ready to use the Client Portal!

If you have questions or require more information, please contact the Client Support team at 1-866-384-5840 Monday through Friday between 8 a.m. and 8 p.m. (EST).

INVESTED IN YOU.

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