iA Private Wealth Mobile App

Self-Registration Guide

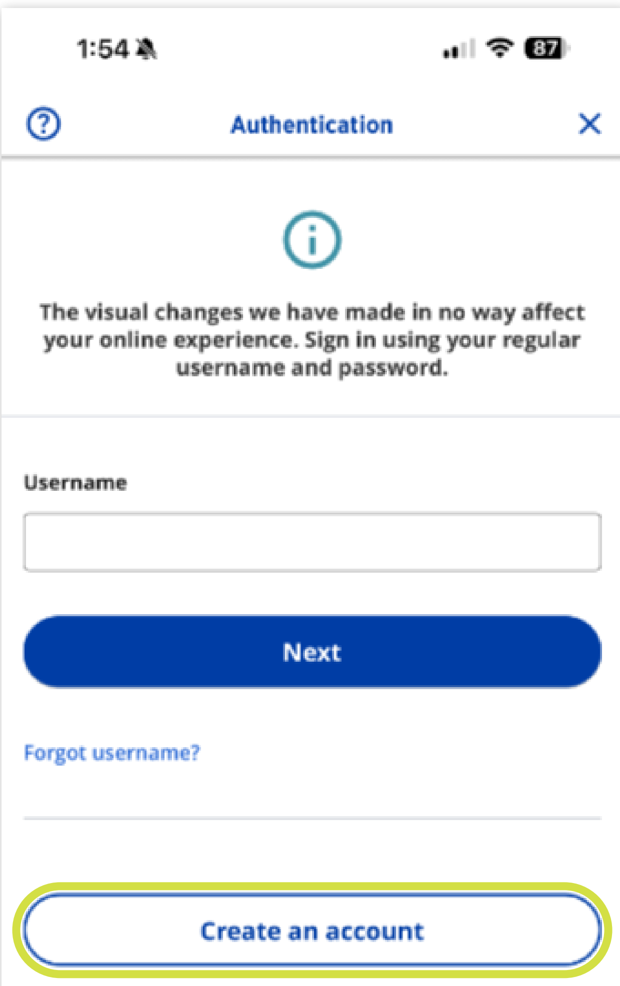
This guide will show you how to register for the iA Private Wealth Mobile App, where you can review your portfolio, access your documents and interact with your advisor.

The app can be downloaded from the Apple App Store or Google Play Store by searching for iA Private Wealth.

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 profile.

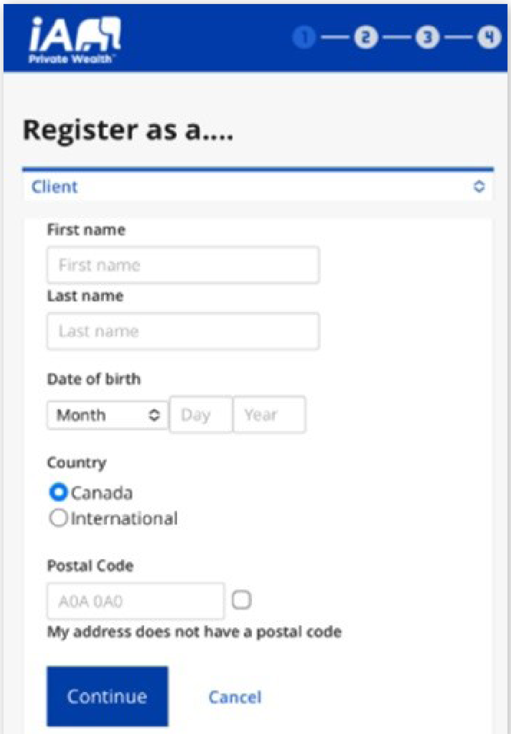
Registering and Setting Up Your Access



Visit iaprivatewealth.ca, click on **Sign In** and then **Create an account**.

If you are already registered for the Client Portal, you can use the same credentials to access the Mobile App.

Registering as a Client



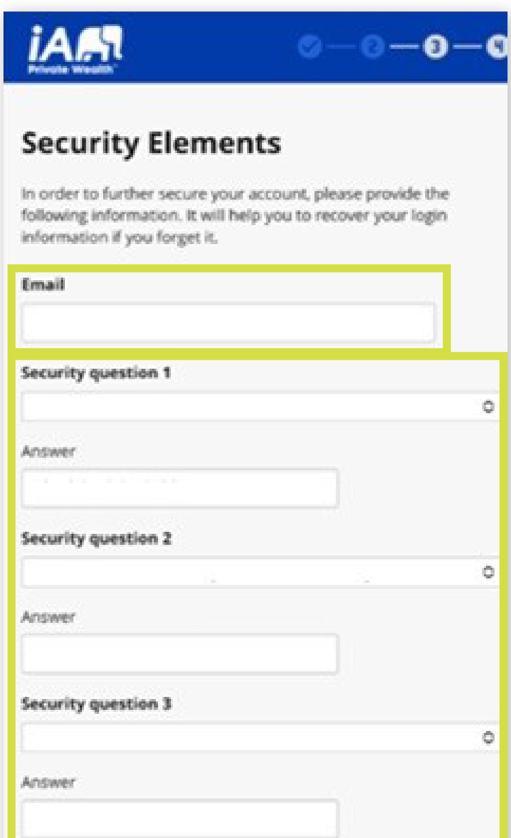
Provide the required information as it appears on your **investment portfolio statement**.

Input your **Client ID** found on your investment portfolio statement or obtain it from your advisor.

Have more than one Client ID? Choose any one of your IDs and your other accounts will be automatically consolidated.

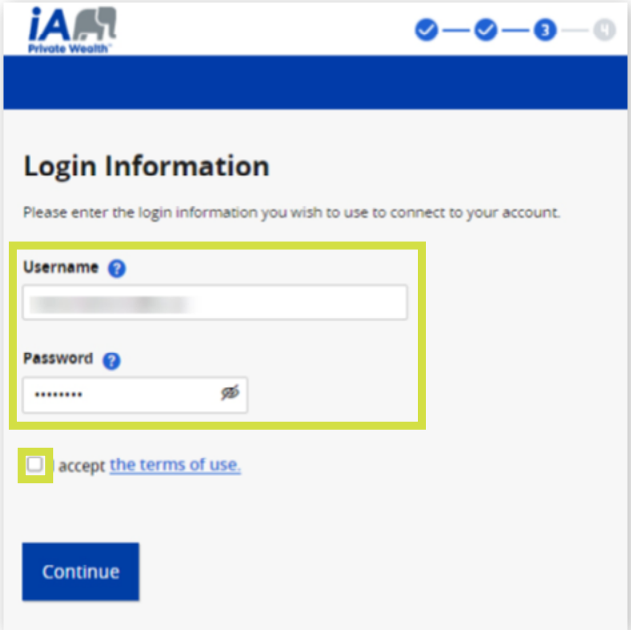
To link your corporate account, please contact our Client Support team at 1-866-384-5840.

Setting Up Security



To register for an account, you will need to provide an email address.

Select **3 security questions** to be able to reset your username or password at a later date.

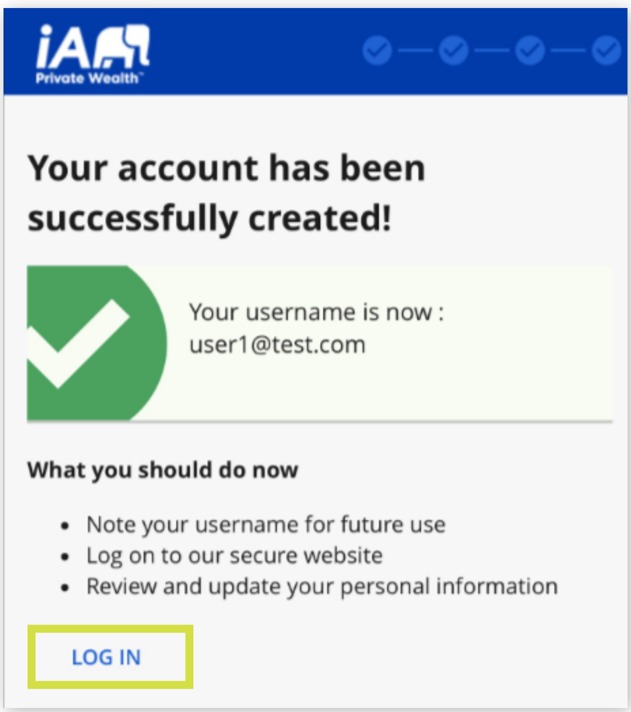


Choose a username and a password. Your username must be:

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

Click ? for more information.

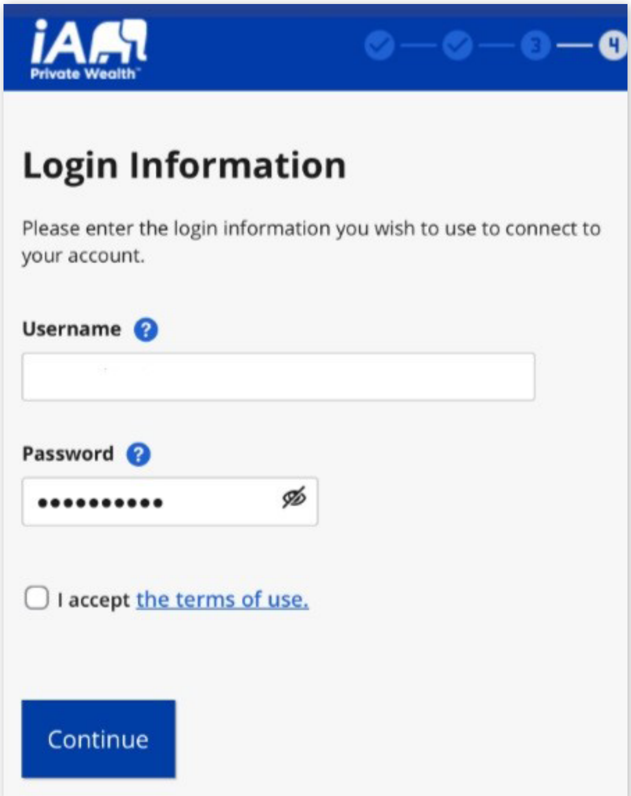
Terms of use must be accepted before you can complete your account setup. For more information, click on **terms of use**.



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

A message confirming your registration will be sent to the email address provided during the registration process.

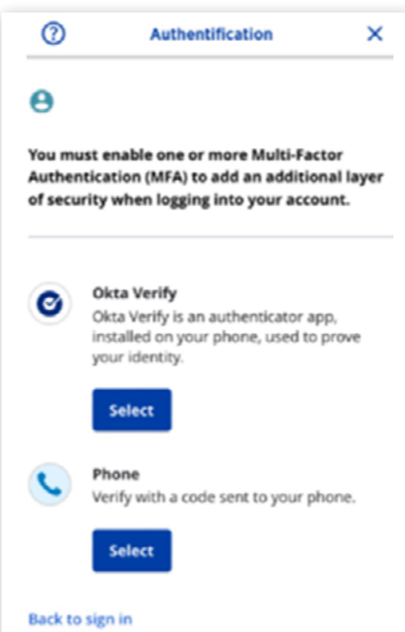
Signing In



Enter your **Username** and **Password** and click the checkbox to accept the terms of use.

Multi-Factor Authentication

When you first sign in, if you are not using biometrics (face ID, fingerprint) you will be asked to set up your multi-factor authentication (MFA) method. Please select one of the three MFA methods available to make your account information more secure.



1. Phone: Text message (SMS) authentication
Using your mobile phone, you can authenticate yourself by entering a unique security code that you will receive via text message when accessing the Client Portal.

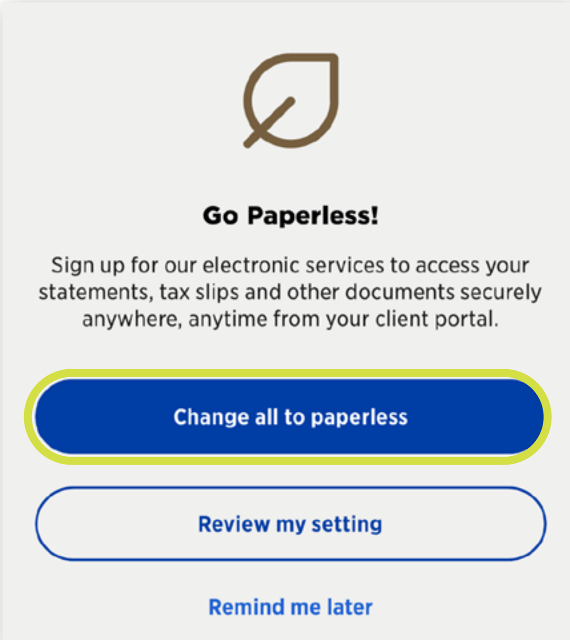
2. Phone: Voice call authentication
You can authenticate yourself by entering a unique security code that you will receive via voice call to your mobile or landline phone when accessing the Client Portal.

3. 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.

If you have already set up MFA in the Client Portal, you can use the same method(s) in the mobile app.

Click here for more information about MFA.

Go Paperless



The first time you sign in to the mobile app, you will be prompted to choose between electronic or paper delivery of your documents. Your selection may be changed at any time in the **Settings** section.

If you wish to receive your documents electronically, click on **Change all to paperless**. A window will open that will prompt you to consent to electronic delivery of all documents. A confirmation message will appear after you complete this step.

You are now ready to use the Mobile App!

If you have questions or require more information, please contact the Client Support team at 1-866-384-5840.

Option 1: For password reset assistance (24/7)

Option 2: For online registration help (24/7)

Option 3: For any other questions (Mon. to Thurs. 8 a.m. to 8 p.m. EST and Fri. 8 a.m. to 6 p.m. EST)

INVESTED IN YOU.

(24-1311) 07/24