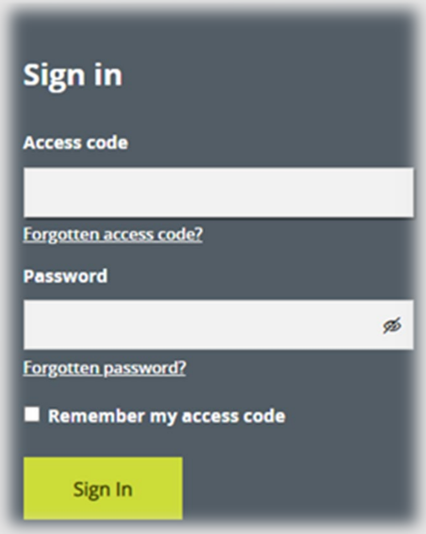
Practice Management

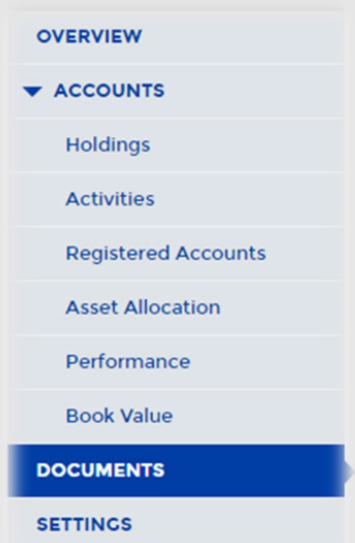
Secure Document Sharing by Client

To securely share documents with your Investment Advisor using the iA Private Wealth Client Portal, follow the instructions below.

1 Sign in to the [iA Private Wealth Client Portal](#).

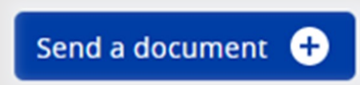


2 Click on **Documents**.



3 The list of historical shared files between you and your Investment Advisor will appear here, along with other documents such as statements, tax slips, etc.

To share a document, click on **Send a document**.

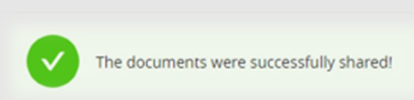


4 Click on the attachment icon to select the file, or drag the file into the box.

5 The file(s) selected will appear below the attachment box.

Click on **Send**.

6 The message below will appear.



The advisor will be notified through e-mail of the shared file(s).

For support, please contact: **1 866 384 5840**

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