

Your Client Portal starter's guide

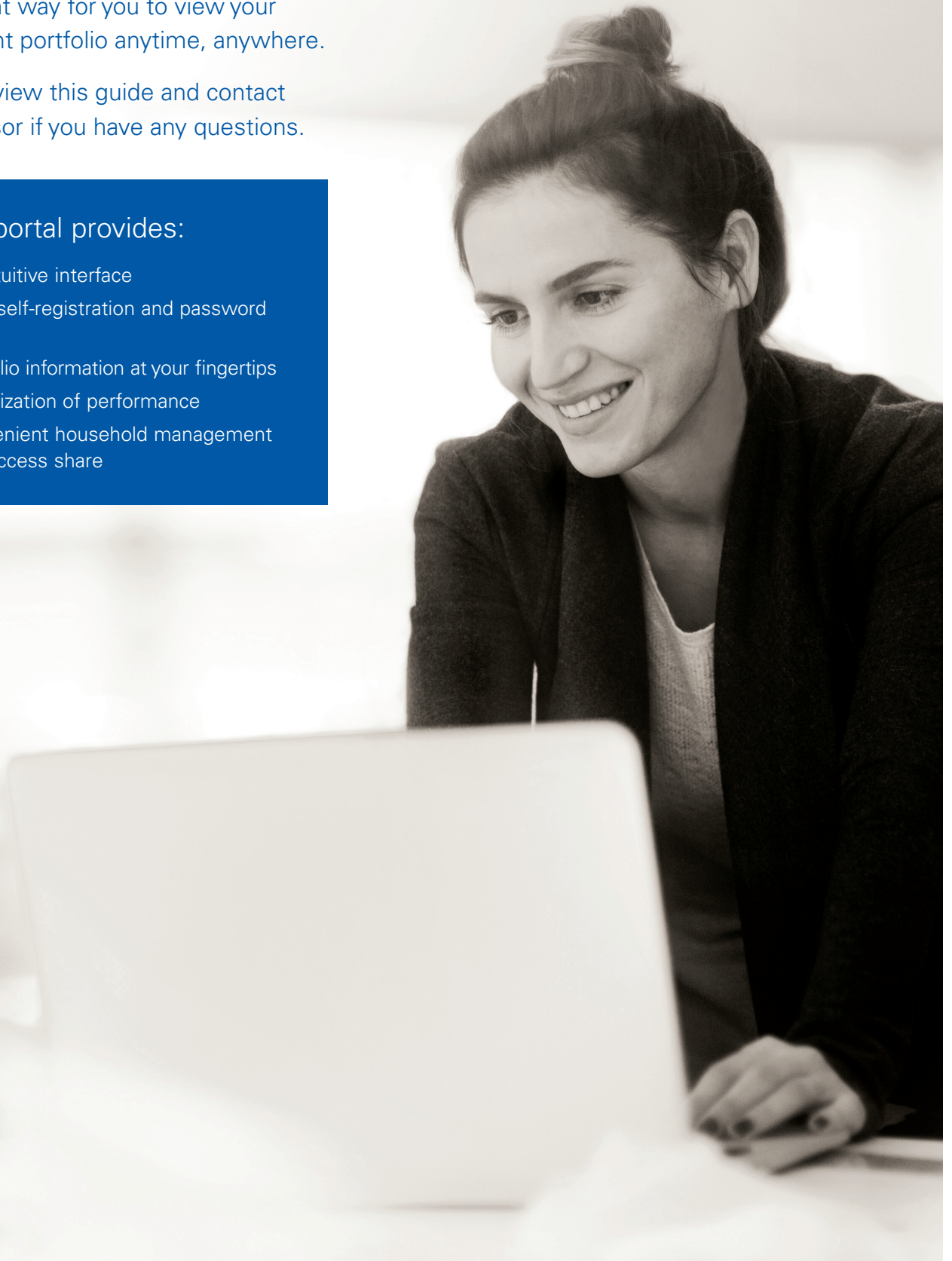


The Client Portal offers a simple and convenient way for you to view your investment portfolio anytime, anywhere.

Please review this guide and contact your advisor if you have any questions.

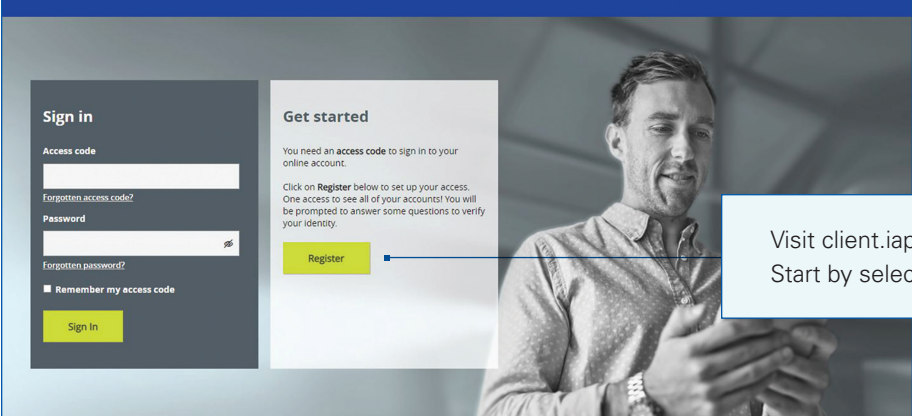
Your portal provides:

- An intuitive interface
- Easy self-registration and password reset
- Portfolio information at your fingertips
- Visualization of performance
- Convenient household management and access share



Registering and setting up your access

Register your account



Visit 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 several input fields: 'First name', 'Last name', 'Date of birth' (with a calendar icon), 'Country' (with radio buttons for 'Canada' and 'International'), 'Postal Code' (with a checkbox for 'My address does not have a postal code'), and 'Client ID' (with a help icon). At the bottom, there are 'Continue' and 'Cancel' buttons. A blue callout box points to the 'Last name' 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

The screenshot shows a registration form titled "Some security basics". It includes fields for Email (investor@email.com), Personalized access code (Investorclient), Password (masked with dots), and Password confirmation (masked with dots). Below these are three security questions, each with a dropdown menu labeled "Choose..." and a corresponding answer field. At the bottom, there is a checkbox for "I accept the terms of use." and a blue "Continue" button.

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.

The screenshot shows a confirmation page titled "Your account has been successfully created!". It features a green checkmark icon and the text "Your access code is now: Investorclient". Below this, there is a section "What you should do now" with three bullet points: "Note your access code for future use", "Log on to our secure website", and "Review and update your personal information". At the bottom, there is a blue "LOG IN" button.

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' form on the left and a 'Get started' section on the right. The 'Sign in' form includes fields for 'Access code' and 'Password', a 'Remember my access code' checkbox, and a 'Sign In' button. The 'Get started' section contains instructions and a 'Register' button. Blue lines connect callout boxes to specific elements in the interface.

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

GO PAPERLESS!
Sign up for our electronic services to access your statements, tax slips and other documents securely anywhere, anytime from your client portal.

[Change all to paperless](#) [Review my settings](#) [Remind me later](#)

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.

Navigating your investment portfolio

Your account overview

The screenshot shows the 'Your account overview' page in the iAM client portal. The page includes a navigation menu on the left, a welcome message for 'JOHN DOE', a 'TOTAL MARKET VALUE' of 2,459,894.99 CAD, and a line graph showing 'Net Investment' and 'Market Value' from 2006 to 2020. Below the graph is a table of 'All Accounts' with columns for account name and value. At the bottom, there is contact information for 'Mike Johnson' and 'Étienne McCann', including their titles, contact details, and a 'TEAM' section listing other staff members.

Callout boxes provide the following information:

- Consolidated market value of your household.** (Points to the 'TOTAL MARKET VALUE' section)
- Change your account configuration:**
 - View personal information and update email
 - Change personalized access code for the portal
 - Update password
 - Modify secret questions and answers
- Net invested progression and asset allocation graphs.** (Points to the 'Net Investment' and 'Market Value' line graph)
- All your accounts and any shared accounts are displayed here. You can manage which accounts to see on Settings > Household.** (Points to the 'All Accounts' table)
- Advisor contact information.** (Points to the contact details for Mike Johnson and Étienne McCann)

View detailed account information

▼ ACCOUNTS
Holdings
Activities
Registered Accounts
Asset Allocation
Performance
Book Value
DOCUMENTS

Holdings: investment holdings broken down by accounts. The consolidated view offers an intuitive way to visualize holdings and asset allocation at the household level.

Activities: transaction history with detailed descriptions. You can use sort and various filters to organize the information. You can export the data for further analysis.

Registered Accounts: information pertained to each registered account type. You can filter by year and account type.

Asset Allocation: detailed breakdown of asset allocation at the household level. You can see how each investment holding is categorized and its respective weighting in the portfolio.

Performance: net invested progression graph, cash flow summary, and rate of return information.

Book Value: track book cost and market value of your investment.

Documents: download and view electronic portfolio statements, tax slips, trade confirms, and more.

Manage household

Household | Access Share | Document Preferences | Nicknames

The household view determines the total market value on the overview page, and is the default account selection that drives displayed on all other pages.

To choose the accounts in your household view, check the boxes below from the list of accounts you have access to.

Owner	Accounts you have access to		Include in your household view	
INDIVIDUAL ACCOUNTS	CAD RRIF	38	Managed Account Program	<input checked="" type="checkbox"/>
	CAD TFSA	38	Managed Account Program	<input type="checkbox"/>

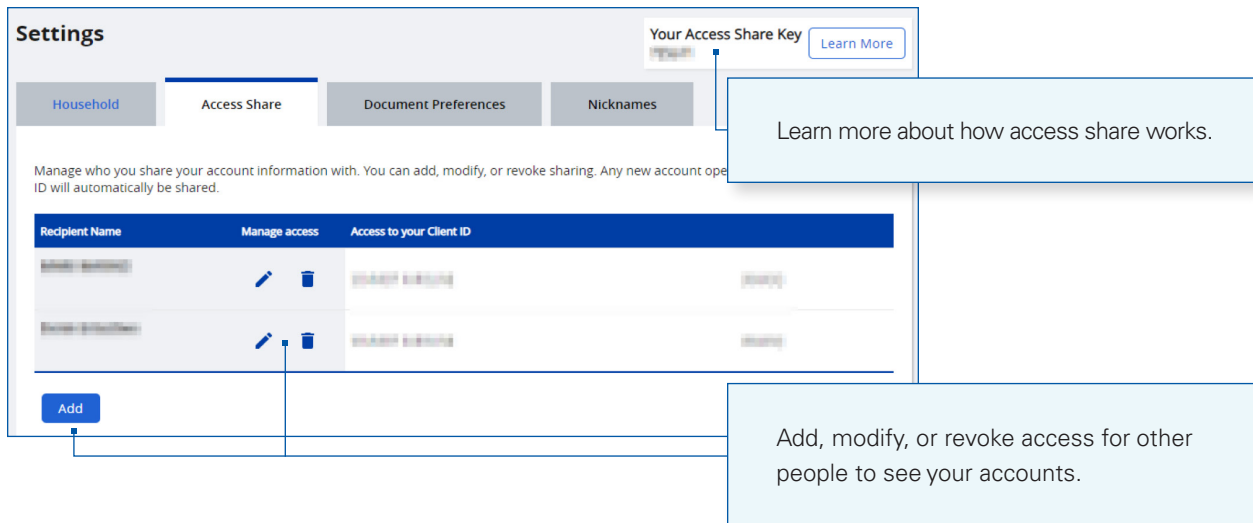
Save

Select the accounts to be included in the household view by clicking on the checkbox. Household view is the default account filter that drives information display on the Overview and other pages.

Click on Save to apply changes.

Manage access share

Use this self-serve function to share account information with another iA Private Wealth client. To share with a third party who is not an iA Private Wealth client, please contact Client Support at 1-866-384-5840.



Settings Your Access Share Key [Learn More](#)

Household **Access Share** Document Preferences Nicknames

Manage who you share your account information with. You can add, modify, or revoke sharing. Any new account opened will automatically be shared.

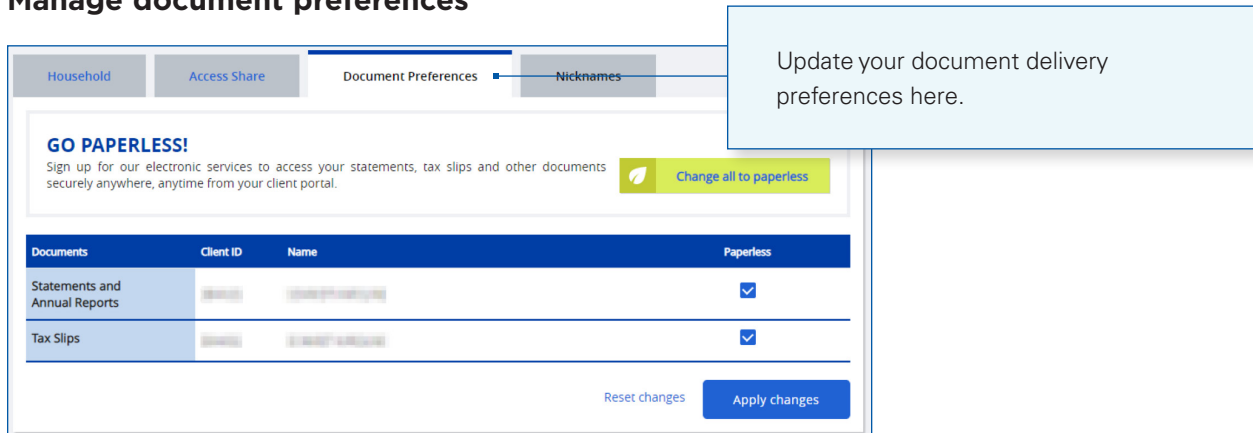
Recipient Name	Manage access	Access to your Client ID
[REDACTED]	[Edit] [Remove]	[REDACTED] [REDACTED]
[REDACTED]	[Edit] [Remove]	[REDACTED] [REDACTED]

[Add](#)

Learn more about how access share works.

Add, modify, or revoke access for other people to see your accounts.

Manage document preferences



Household Access Share **Document Preferences** Nicknames

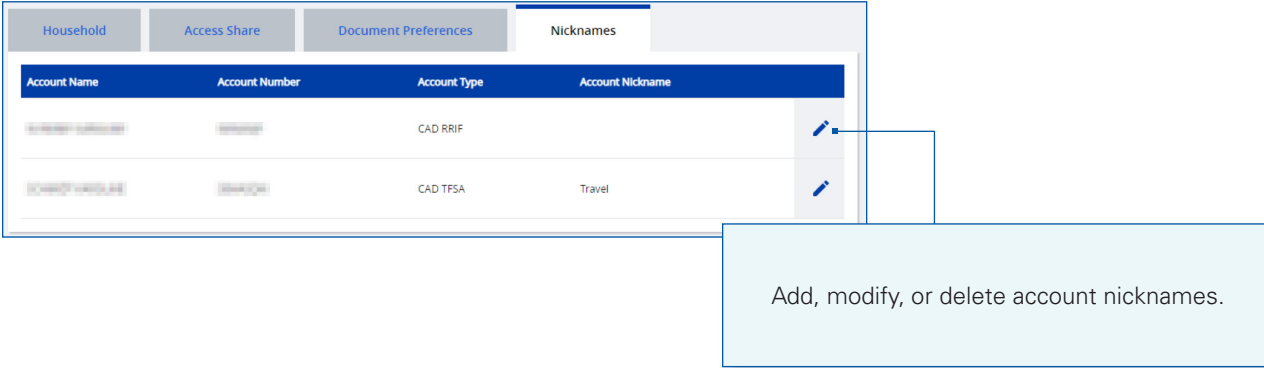
GO PAPERLESS!
Sign up for our electronic services to access your statements, tax slips and other documents securely anywhere, anytime from your client portal. [Change all to paperless](#)

Documents	Client ID	Name	Paperless
Statements and Annual Reports	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>
Tax Slips	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>

[Reset changes](#) [Apply changes](#)

Update your document delivery preferences here.

Manage account nicknames



The screenshot shows a user interface with four tabs: Household, Access Share, Document Preferences, and Nicknames. The Nicknames tab is active, displaying a table with the following columns: Account Name, Account Number, Account Type, and Account Nickname. Two rows are visible in the table, each with a pencil icon in the right-hand column. A callout box points to the first pencil icon with the text: "Add, modify, or delete account nicknames."

Account Name	Account Number	Account Type	Account Nickname	
[Redacted]	[Redacted]	CAD RRIF		[Pencil icon]
[Redacted]	[Redacted]	CAD TFSA	Travel	[Pencil icon]

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

INVESTED IN YOU.

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