

Client Portal Self-Registration Guide



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

The screenshot shows the 'CLIENT PORTAL' login and registration interface. At the top, there is a blue header with the text 'CLIENT PORTAL'. Below this, a white box contains an information icon and a message: 'The visual changes we have made in no way affect your online experience. Sign in using your regular username and password.' The main form area has a 'Username' label above a text input field, followed by a 'Password' label above a password input field with a toggle eye icon. Below the password field is a checkbox labeled 'Remember my username'. A large blue button labeled 'Sign In' is positioned below the checkbox. Underneath the 'Sign In' button are two links: 'Forgot your password?' and 'Forgot your username?'. At the bottom of the form, there is a yellow-outlined button labeled 'Create an account'.

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

Registering as a Client

Register as a....

Client

First name

Last name

Date of birth

Country
☒ Canada
☐ International

Postal Code ☐ My address does not have a postal code

Client ID

Continue **Cancel**

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

Security Elements

In order to further secure your account, please provide the following information. It will help you to recover your login information if you forget it.

Email

Security question 1

Answer

Security question 2

Answer

Security question 3

Answer

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

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

Login Information

Please enter the login information you wish to use to connect to your account.

Access code ?

Password ?

☐ I accept [the terms of use](#).

Continue

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.

Your account has been successfully created!



Your access code is now:

XXXXXXXXXX

What you should do now

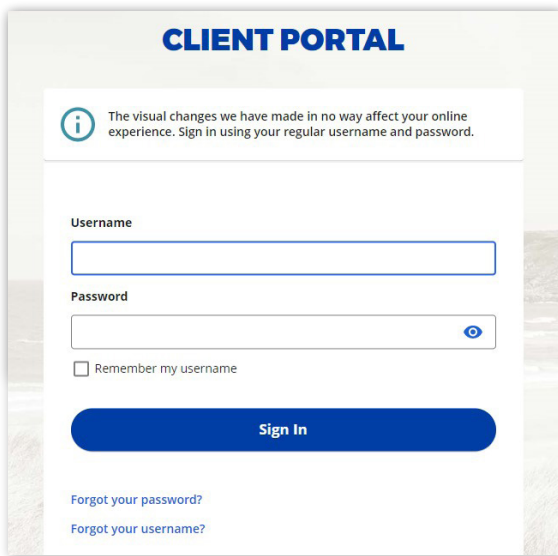
- Note your access code for future use
- Log on to our secure website
- Review and update your personal information

LOG IN

Click on **LOG IN** to return to the registration page and 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



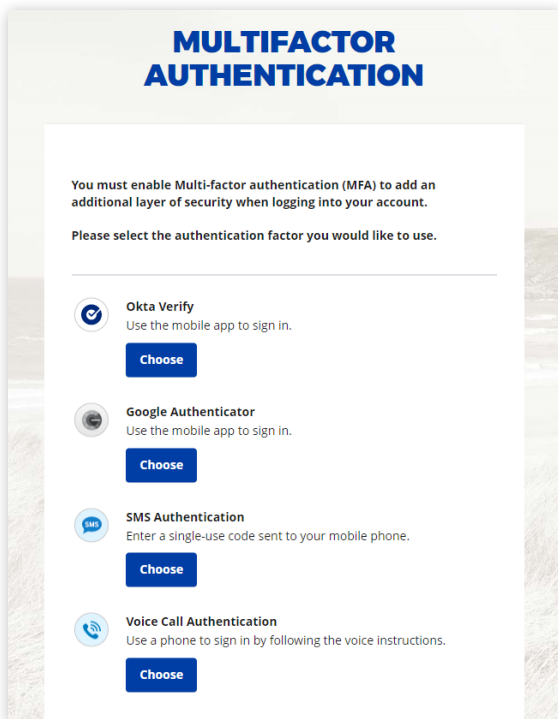
The screenshot shows the 'CLIENT PORTAL' sign-in interface. At the top, a blue header reads 'CLIENT PORTAL'. Below it, an information icon (i) is followed by the text: 'The visual changes we have made in no way affect your online experience. Sign in using your regular username and password.' The form includes a 'Username' label and a text input field, a 'Password' label and a password input field with an eye icon for toggling visibility, and a checkbox labeled 'Remember my username'. A large blue 'Sign In' button is positioned below the fields. At the bottom, there are two links: 'Forgot your password?' and 'Forgot your username?'.

Enter the **access code** you used during the registration process.

If you forget your **access code** 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.



The screenshot shows the 'MULTIFACTOR AUTHENTICATION' selection screen. The header reads 'MULTIFACTOR AUTHENTICATION'. Below it, a message states: 'You must enable Multi-factor authentication (MFA) to add an additional layer of security when logging into your account.' This is followed by the instruction: 'Please select the authentication factor you would like to use.' There are four options, each with an icon, a title, a description, and a blue 'Choose' button: 1. 'Okta Verify' with a checkmark icon, description 'Use the mobile app to sign in.' 2. 'Google Authenticator' with a camera icon, description 'Use the mobile app to sign in.' 3. 'SMS Authentication' with a speech bubble icon, description 'Enter a single-use code sent to your mobile phone.' 4. 'Voice Call Authentication' with a phone handset icon, description 'Use a phone to sign in by following the voice instructions.'

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

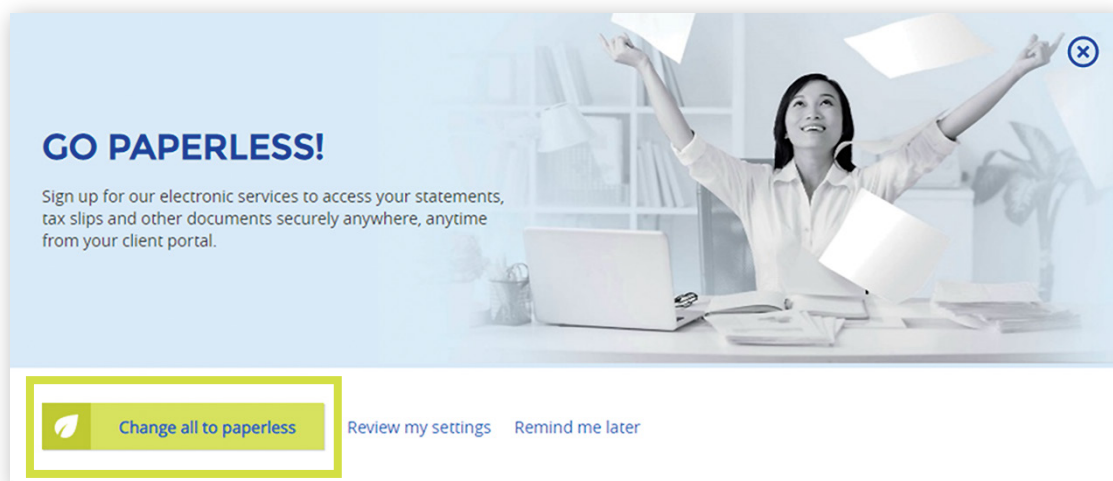
This app can be downloaded to your iPhone or Android mobile device and allows you to generate a unique security code to access the Client Portal. To learn more about this authentication method, [click here](#).

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.

iA Private Wealth Inc. is a member of the Canadian Investor Protection Fund and the Investment Industry Regulatory Organization of Canada. iA Private Wealth is a trademark and business name under which iA Private Wealth Inc. operates.

iaprivatewealth.ca