



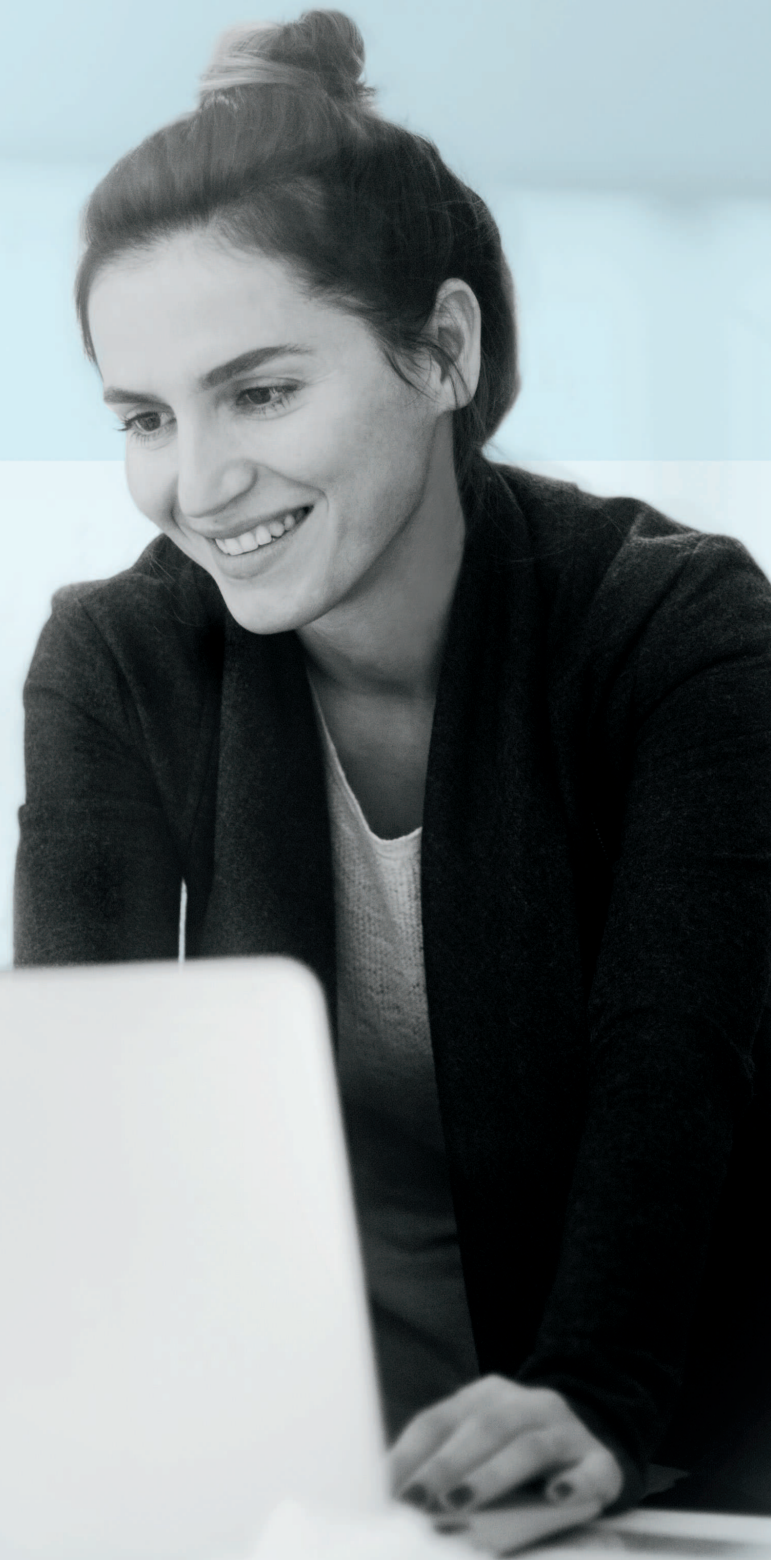
## YOUR CLIENT PORTAL STARTER'S GUIDE

The Client Portal at [client.investia.ca](https://client.investia.ca) offers a simple and convenient way for you to view your investment portfolio and personal profile anytime, anywhere.

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

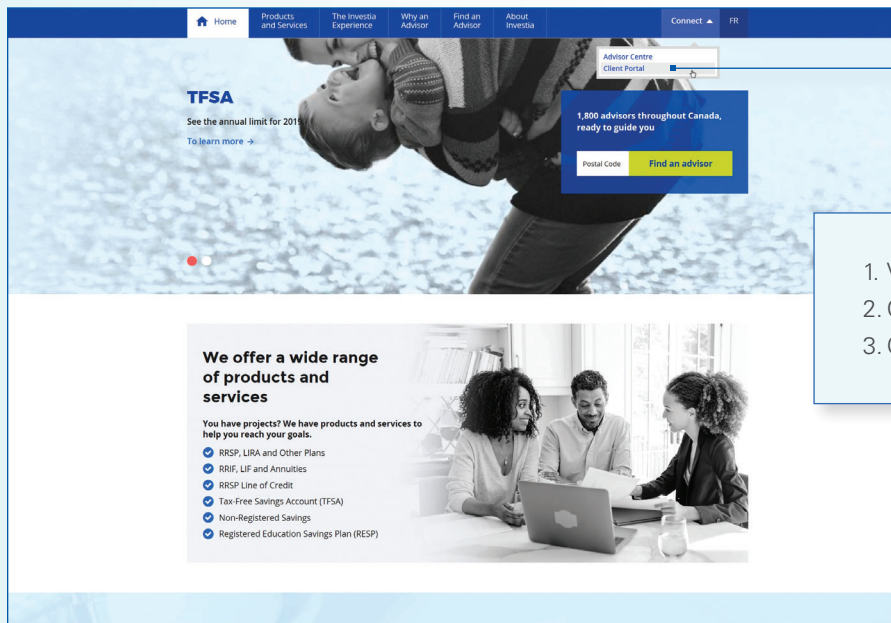
### Your portal provides:

- An intuitive interface
- Mobile friendly access
- Up-to-date financial information at your fingertips
- Access to your investor profile
- Easy-to-use financial calculators
- Convenient way to update contact information
- A secure method of sharing information and documents with your advisor



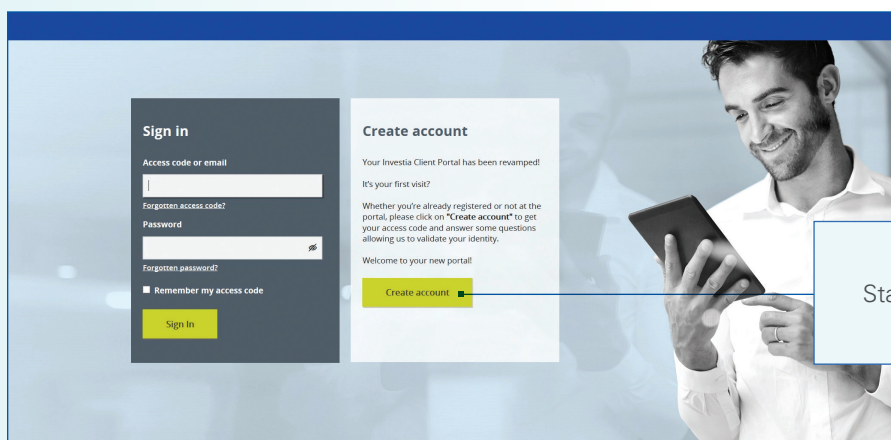
# REGISTERING AND SETTING UP YOUR PROFILE

## Accessing your client portal



1. Visit **Investia.ca**
2. Click **Connect**
3. Click **Client Portal**

## Creating your account



Start by selecting **Create account**.

## Registering as a client

**Register as a....**

**Client**

First name Last name

Date of birth

Month Day Year

Postal code for correspondence

A0A 0A0 Canada

Select one of the following options

☒ Client number ?

Client number

☐ Activation key ?

☐ I do not have this information. Help me get my activation key.

Continue Cancel

Provide the required information as it appears on your quarterly statement.

Input your **client number** (view your quarterly statement or ask your advisor) or select **activation key**.

Have more than one account?  
Choose one client number and your other accounts will be automatically consolidated.\*

\*Except for corporate accounts

## Registering as a company

**Register as a....**

**Client Company**

Company name

Company name

Postal code for correspondence

A0A 0A0 Canada

Do you have your activation key? ?

☒ Yes, I have my activation key.

XXXX - XXXX - XXXX

☐ No. Help me! I want to get my activation key.

Continue

Provide the name of the company as it appears on your quarterly statement.

You can choose to receive your **activation key** by mail or email. Once you receive it, enter the information here.



## Setting up security

**Some security basics**

Email  
investor@email.com

Personalized access code ?  
Investorclient

Password ?  
••••••••

Password confirmation  
••••••••

**Security questions**  
Should you have trouble logging in, these security questions will be used to assist you. ?

Question no 1  
Choose... [v]

Answer no 1  
[ ]

Question no 2  
Choose... [v]

Answer no 2  
[ ]

Question no 3  
Choose... [v]

Answer no 3  
[ ]

☐ I accept [the terms of use.](#)

Continue

To register an account, you will need an email address or personalized access code and a password. If you choose to use an **access code**, it must be:

- Unique and from 8 to 15 characters
- Different from your password
- Different from other personalized access codes
- Composed of special characters


Your access code can be changed at any time in the account configuration section. If it is used by another user, please create a different access code.

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.

**Your account has been successfully created!**

 Your access code is now: Investorclient

**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 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 login and registration interface. On the left, the 'Sign in' section has a header, a label 'Access code or email', a text input field containing 'Investorclient', a link 'Forgotten access code?', a label 'Password', a password input field with masked characters, a link 'Forgotten password?', a checkbox 'Remember my access code', and a yellow 'Sign In' button. On the right, the 'Create account' section has a header, a message 'Your Investia Client Portal has been revamped!', a question 'It's your first visit?', a paragraph explaining the registration process, a welcome message 'Welcome to your new portal!', and a yellow 'Create account' button. Blue lines connect the 'Forgotten access code?' and 'Forgotten password?' links to explanatory text boxes on the right.

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 e-delivery

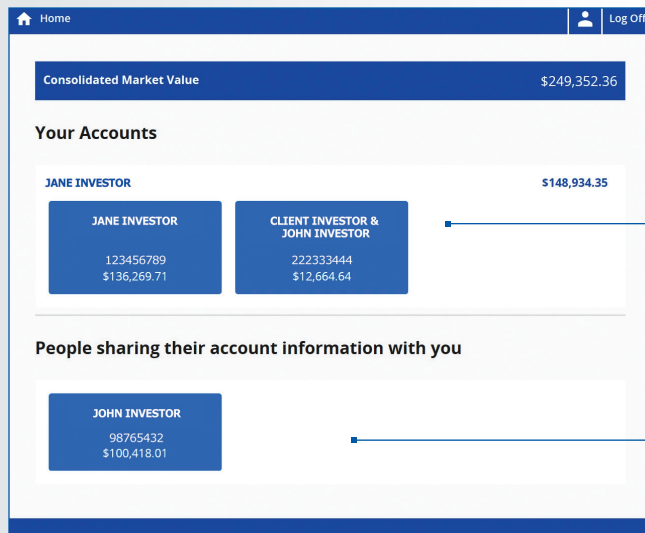
The screenshot shows the 'Registration for e-delivery' form. At the top, it says 'Home' and 'Log Off'. The title is 'Registration for e-delivery' with the subtitle 'A flexible and secure solution!'. Below this, it says 'Go paperless and sign up to receive your documents online. You will be notified by email when new documents are available for consultation from your Client Portal.' and 'Save your preferences for each of your accounts.' The form has a 'Personal email' section with a text input field containing 'investor@email.com' and a close button. Below that is the 'E-delivery of statements' section with a checked checkbox 'I agree to access my documents online in my Client Portal.' and an 'Apply' button. A progress indicator shows '1' and a checkmark.

When you first login, you will be prompted to choose between receiving your documents electronically or in paper format.

This option can be changed at any time under the **Client Information** section.

# NAVIGATING YOUR INVESTMENT PORTFOLIO

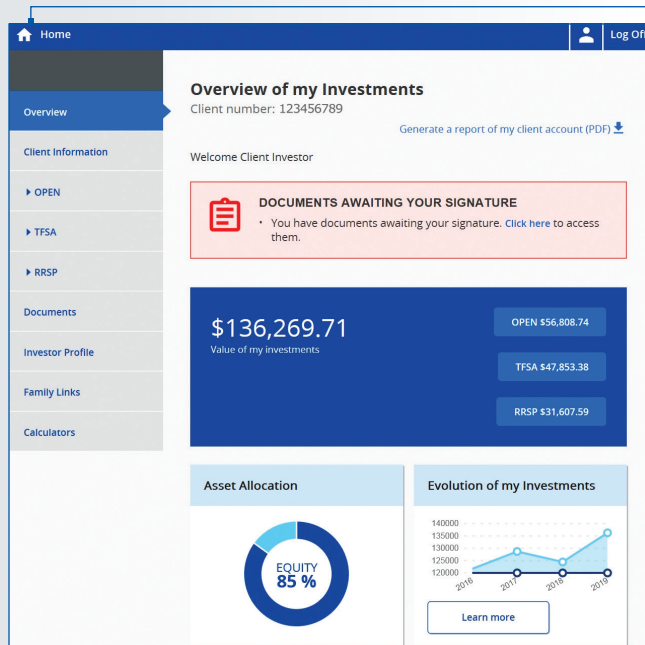
## Your home page



All your accounts are displayed here. Click on an account for an overview. If you have only one account, this account tile will not be visible.

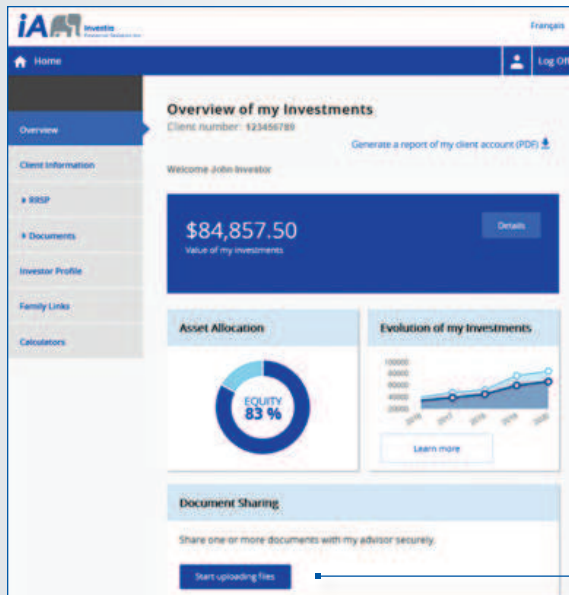
Accounts sharing their information with you are displayed here.

## Your account overview



To view another account, click on **Home** to go back to the Accounts page.

## Sharing documents/messages with your advisor



The security of your information is our priority. We encourage you to take advantage of the document/message sharing options.

To begin, from the Client Portal main screen, click on **Start uploading files**.



You can also upload documents from your smartphone or tablet.



1. Include a **Subject**
2. Add as many documents as necessary
3. You can also add a message to your advisor if applicable
4. Click on **Send**

Your advisor will receive a notification and be able to view the documents and messages you have shared.

To view a history of documents and messages you've shared, click on **Document Sharing** and **History of Communications**.

You can consult documents and messages sent and/or suppress in case of a mistake.

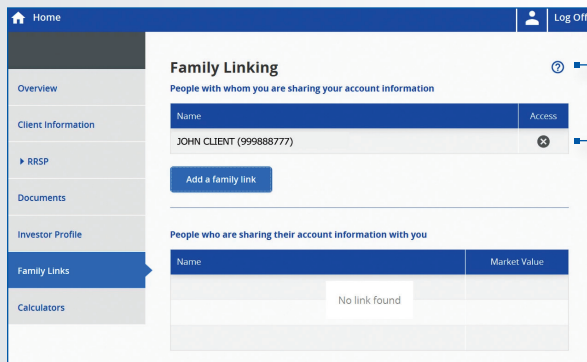
## Managing your information

You can change your account information and/or options such as your password, access code, etc. here.

Update your contact information here.

Update your document e-delivery preferences here.

## Connecting family members



Click here for a tutorial on how to use the **Family Linking** feature.

Share or remove third-party access to one or more of your accounts.

If you have questions or require more information, please contact your Investia advisor.

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## About Investia

Investia Financial Services Inc. is a mutual fund dealer that offers a complete line of financial products and services. Our advisors place their expertise at your service to make your projects a reality.

Investia is a wholly-owned subsidiary of iA Financial Group, the fourth largest life and health insurance company in Canada and one of the largest publicly-traded companies in the country. Industrial Alliance stock is listed on the Toronto Stock Exchange under the ticker symbol IAG.

Investia and iA Wealth share the following values: reliability, trust and credibility.

Investia Financial Services Inc. is a wholly-owned subsidiary of Industrial Alliance Insurance and Financial Services Inc., a life and health insurance company which operates under the trade name iA Financial Group.

[investia.ca](https://investia.ca)



INVESTED IN YOU.