Client Portal

Starter's Guide

iA Investia Financial Services Inc.

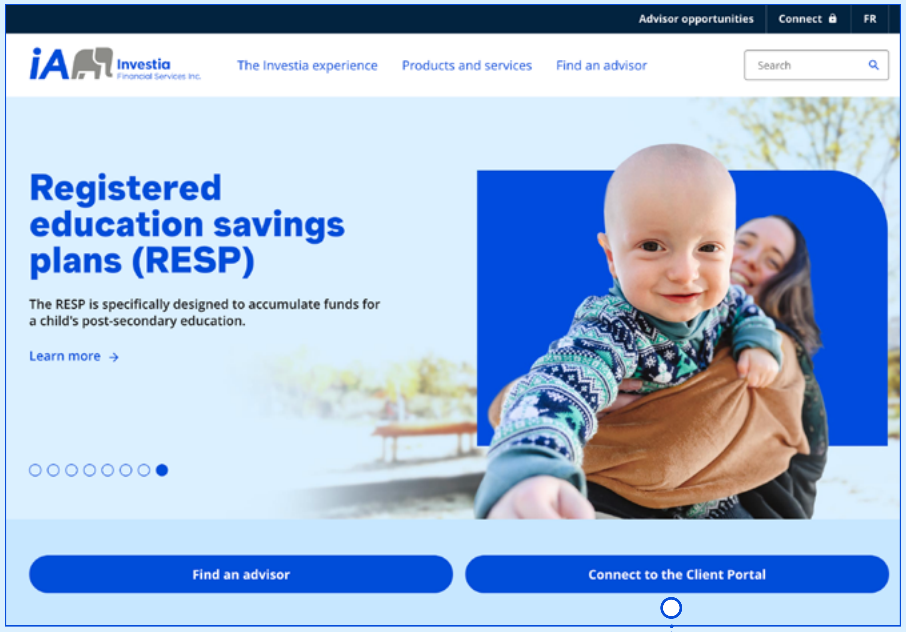
The Client Portal at client.investia.ca offers a simple and convenient way for you to view your investment portfolio and personal profile anytime, anywhere.

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

Your portal provides:

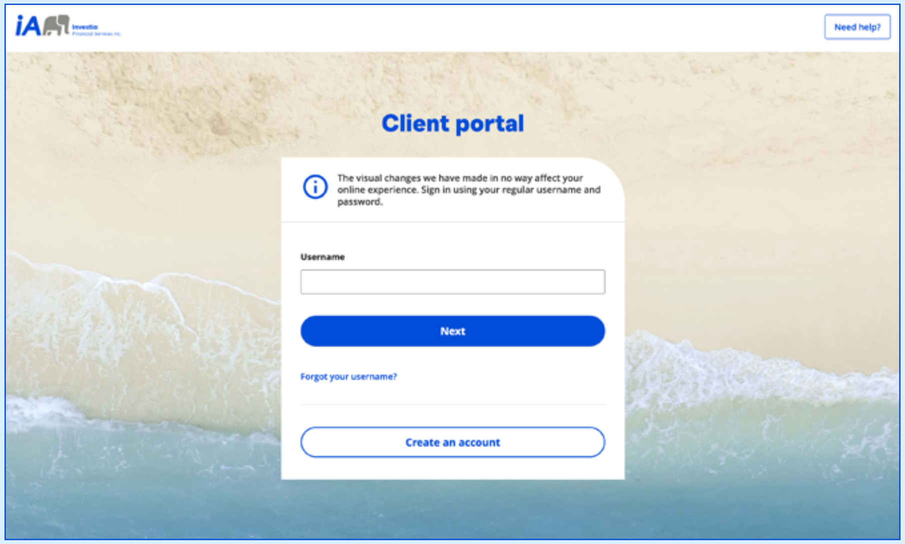
- An intuitive interface
- Mobile friendly access
- Up-to-date financial information at your fingertips
- Access to your investor profile
- Easy-to-use financial calculators
- A convenient way to update your personal information
- A secure method of sharing information and documents with your advisor

Accessing your Client Portal



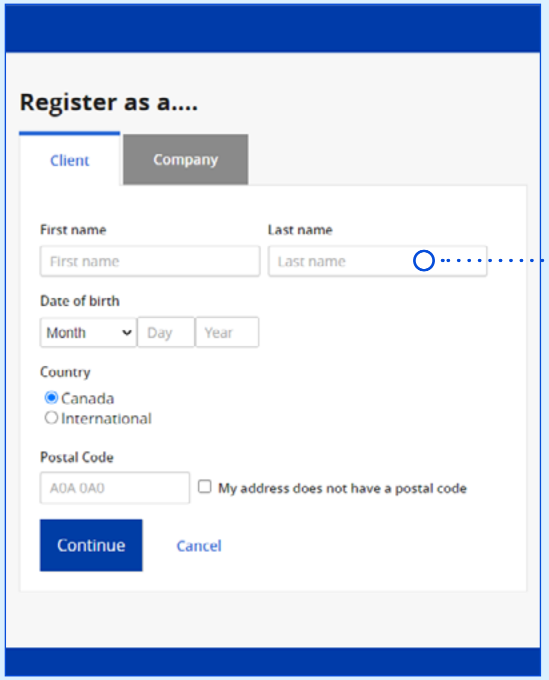
Click here to sign in or create an account.

Creating your account

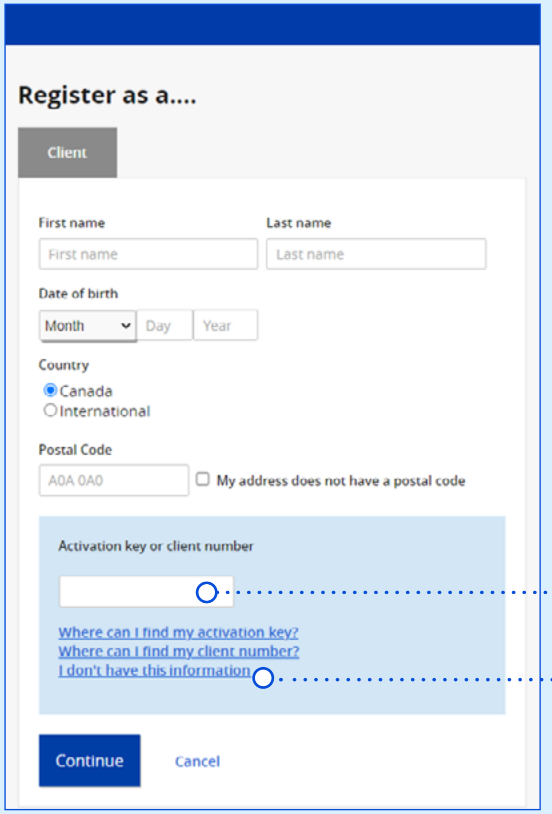


Click here to access useful resources.

Registering as a client



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



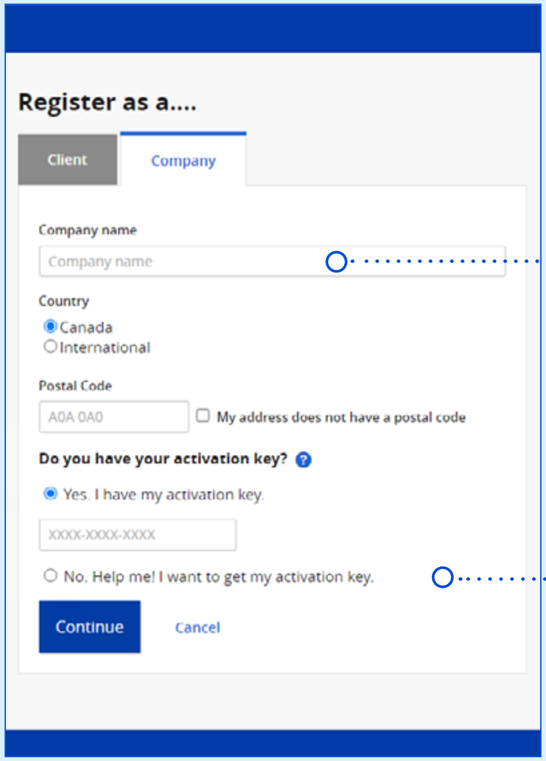
Click here to get your activation key.

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

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

*Except for corporate accounts

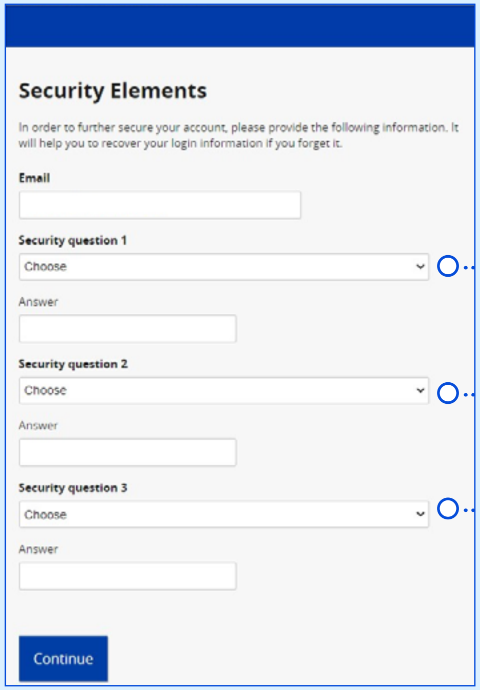
Registering as a company



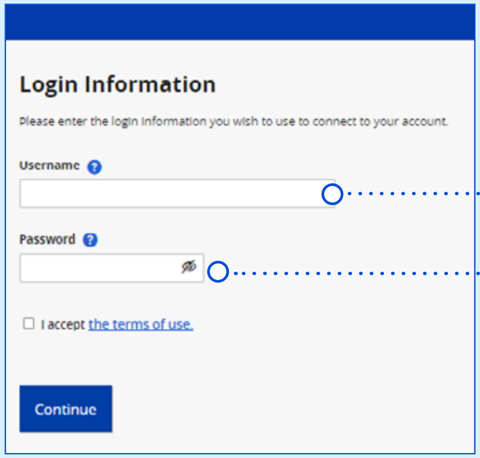
You can choose to receive your **activation key** by mail or email. Once you receive it, enter the information here.

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

Setting up security



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



To create an account, you must choose a personalized username. It is recommended that you use an email address as your username, but if you prefer another format, it must be:

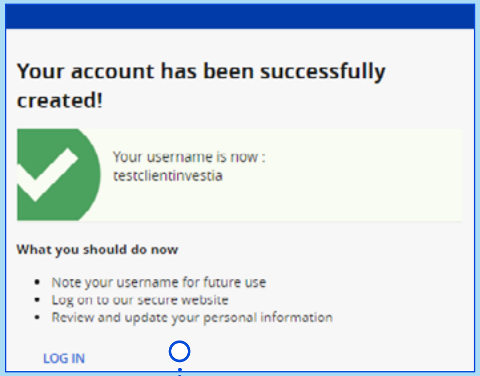
- Between 8 and 60 characters
- Different from your password
- Different from another username
- Composed of valid special characters

Click on “?” for more information.

Your **password** must contain between 8 and 63 characters, including at least 3 of the 4 following types of characters:

- lower case letters
- upper case letters
- numbers
- special characters (e.g. $, %, @, !).

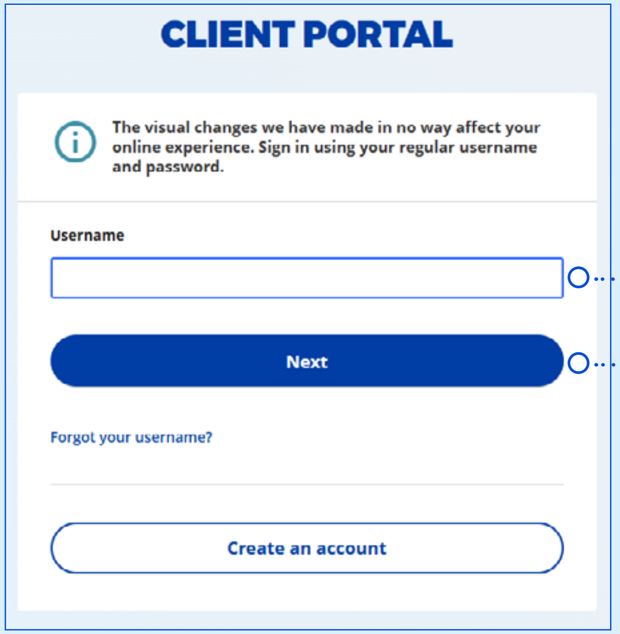
Your password cannot be your username or one of your last 5 passwords.



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

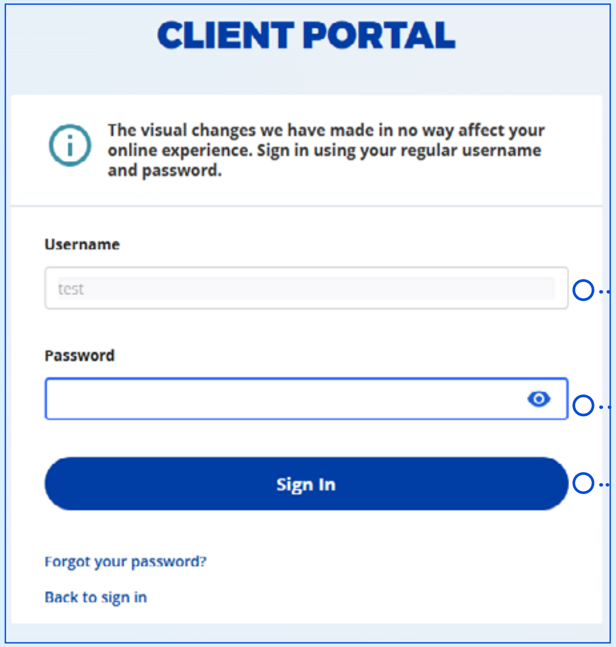
An email confirming the creation of your account will be sent to the email address provided during the registration process.

Signing in



On your computer, go to the Client Portal and enter your Username.

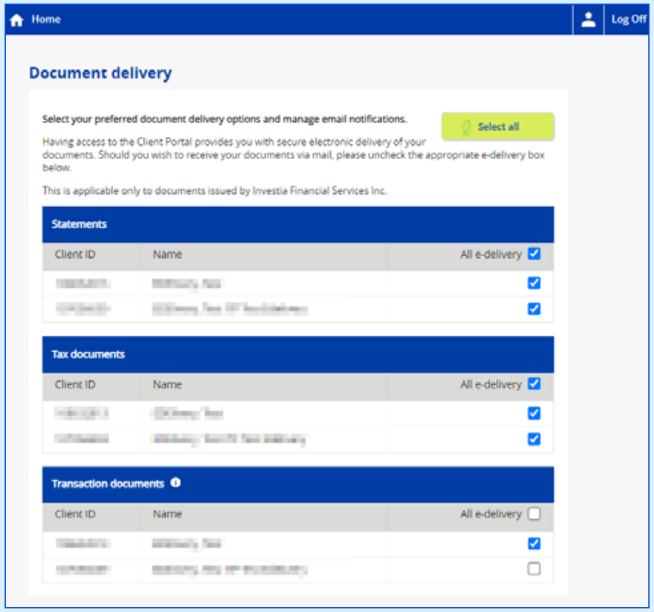
Then click on **Next**.



Enter your password.
Then click on **Sign In**.

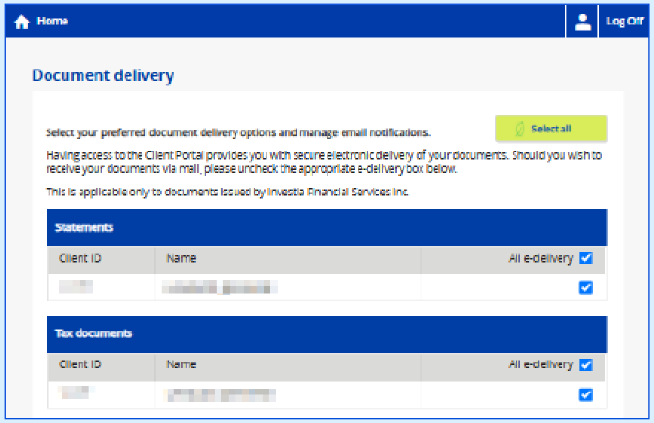
If you forgot your username or password, click here to securely reset it.

Registering for e-delivery



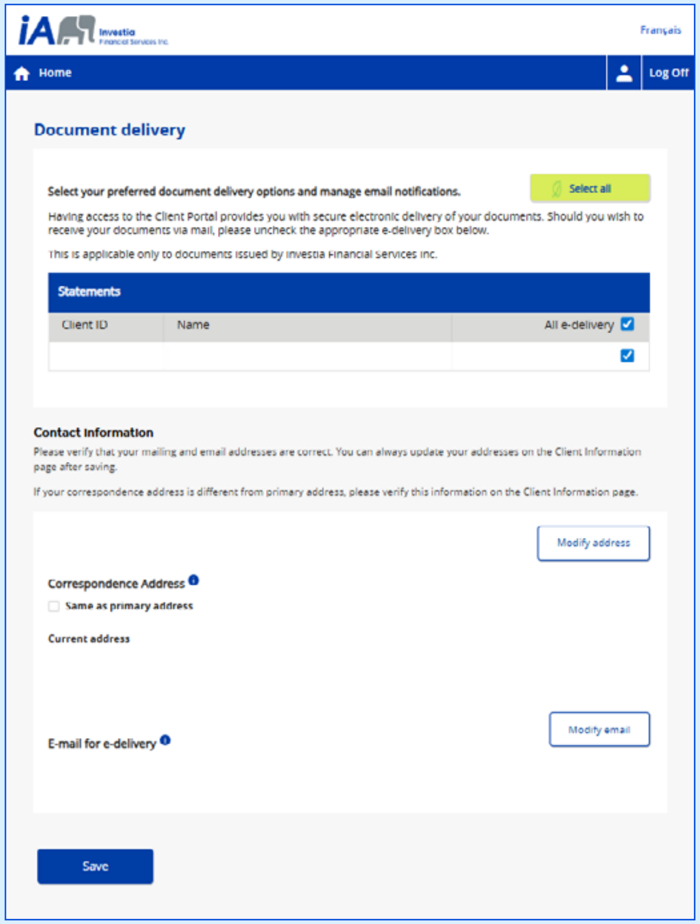
When you first log in, you will be prompted to choose between receiving your documents electronically or in paper format.

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

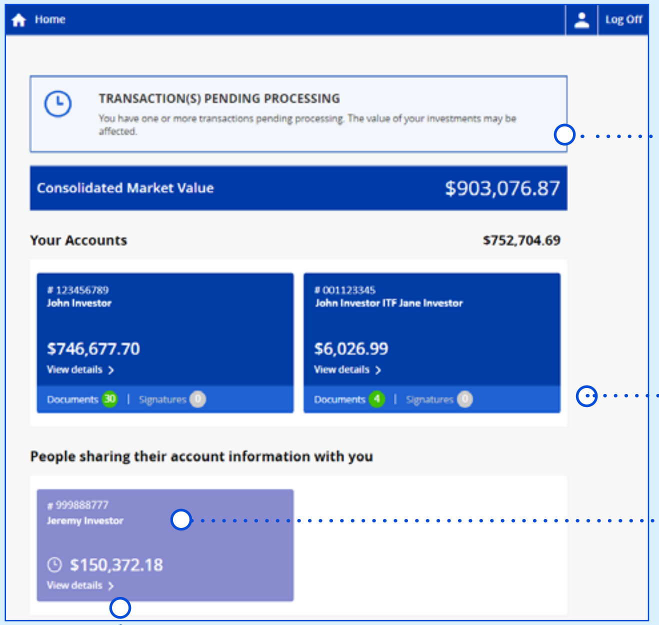


Registering for e-delivery

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



Your home page



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

A banner will be displayed to inform you that you have one or more transactions waiting to be processed.

A similar banner may also be displayed to inform you that a document is waiting for your signature.

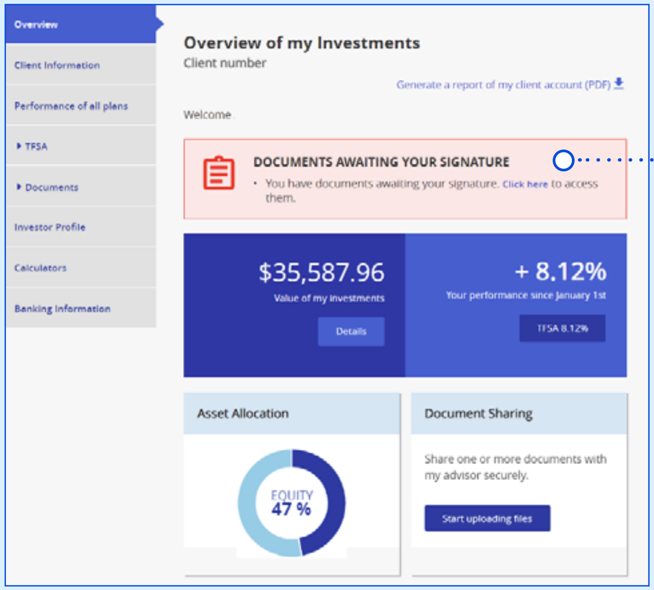
All your accounts are displayed here.

Click on an account for an overview.

All accounts shared with you will be displayed here.

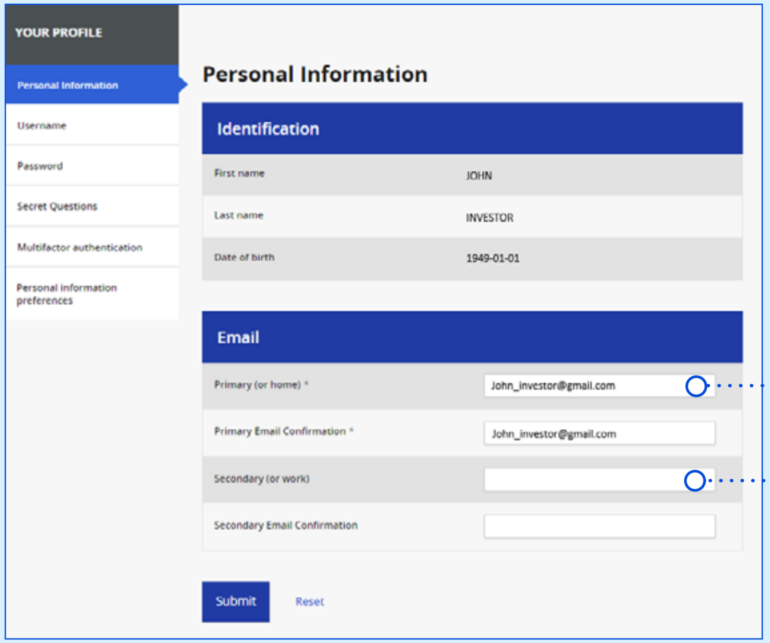
Click on **View details** to access the overview of the investments per client number.

Your account overview

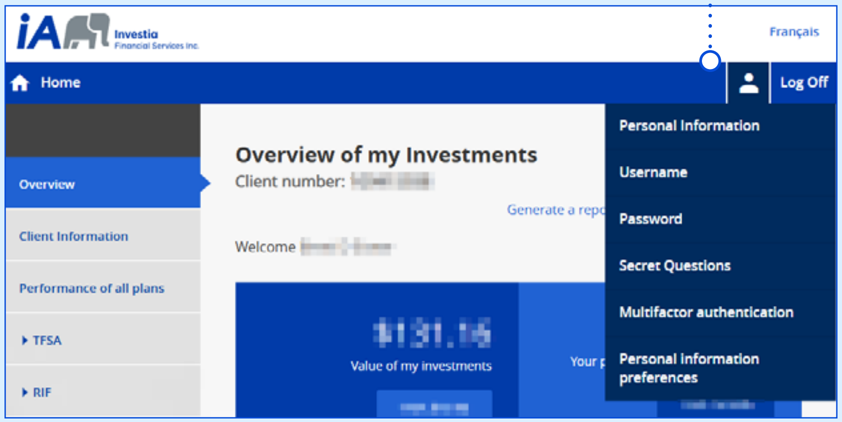


This notification will appear when documents are awaiting your signature.

Update your personal information

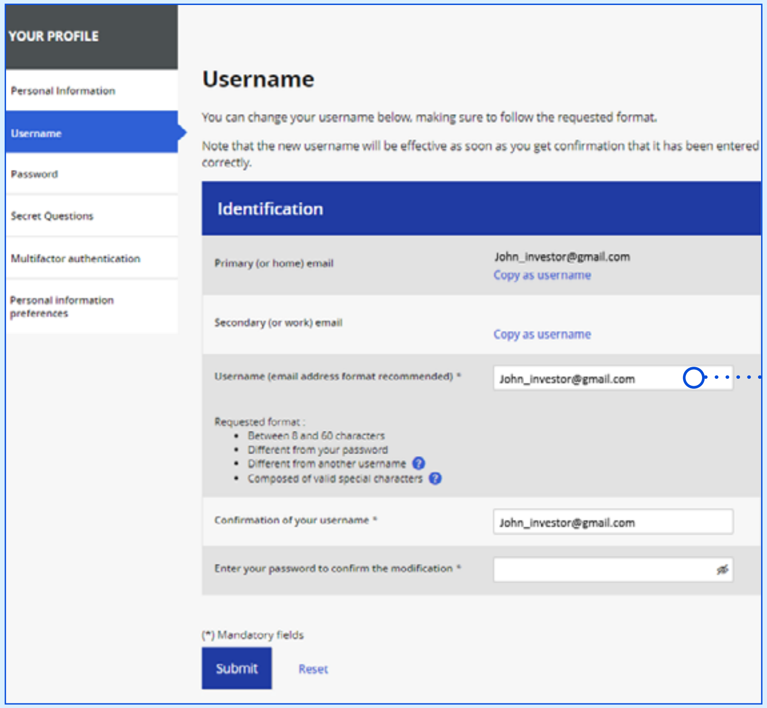


You can add and/or modify your primary and secondary email here.



Click on the person icon in the top right-side corner to access the **Personal information** section.

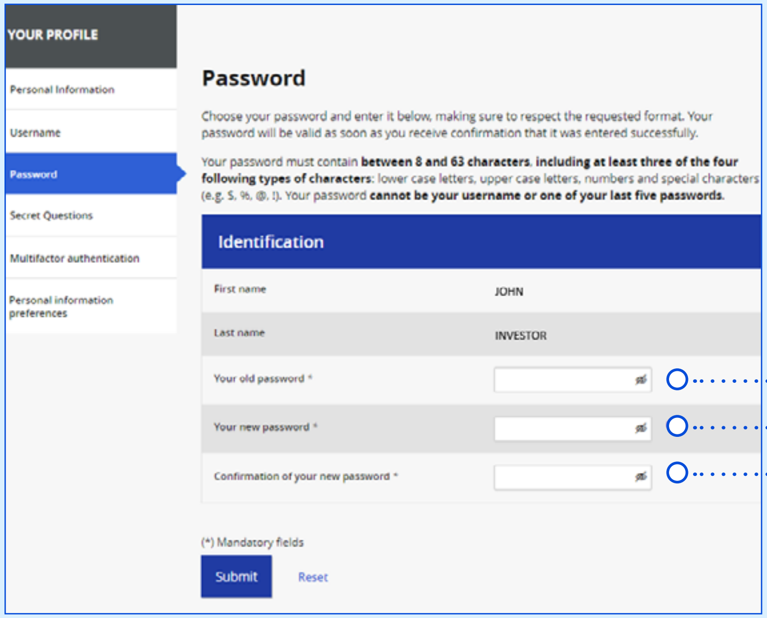
Modify your username



You can change your username from here.

Please refer to page 5 for detailed format requirements.

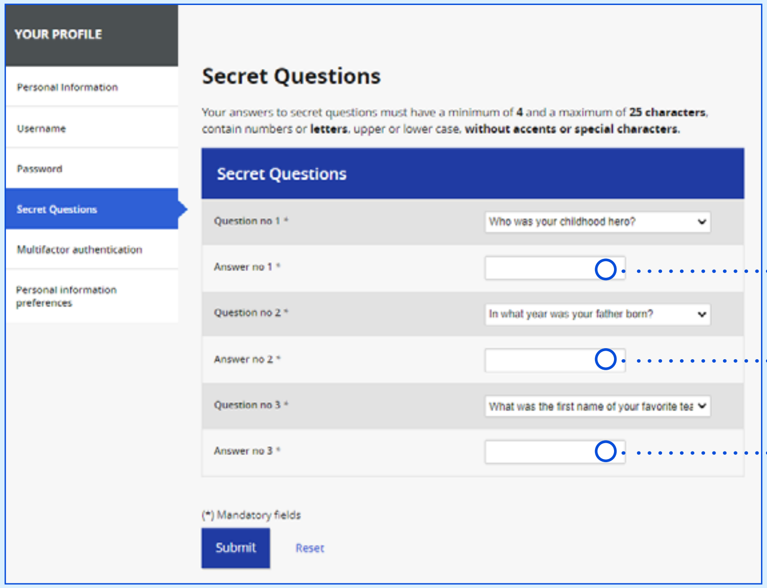
Modify your password



You can change your password from here.

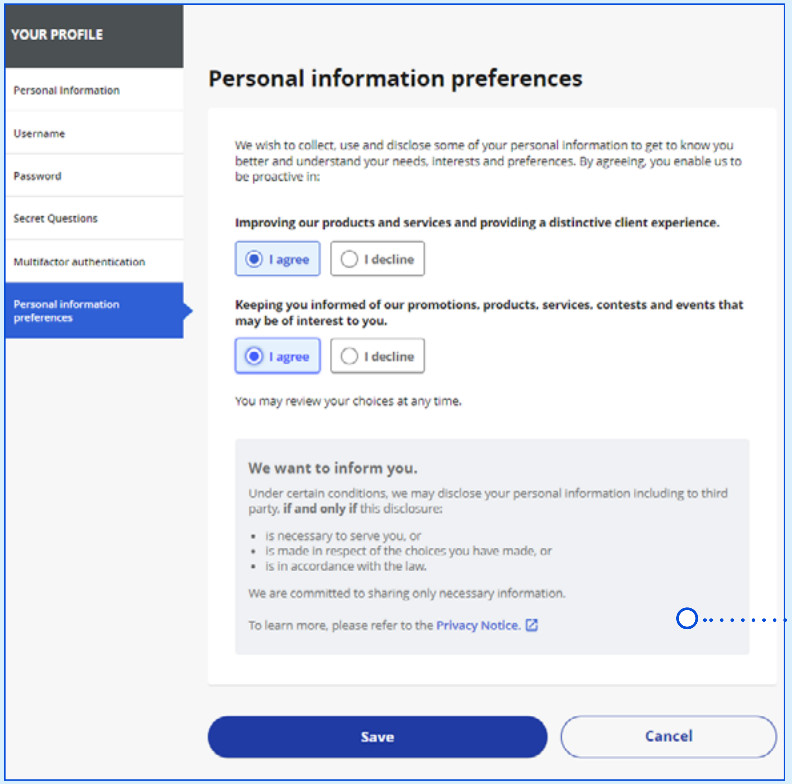
Please refer to page 5 for detailed format requirements.

Modify your secret questions



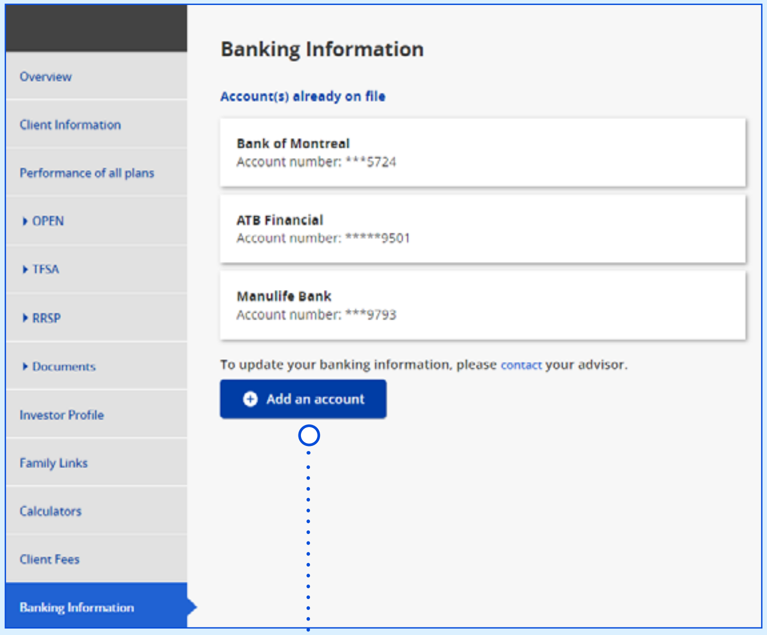
You can change your secret questions and answers from here.

Personal information preferences

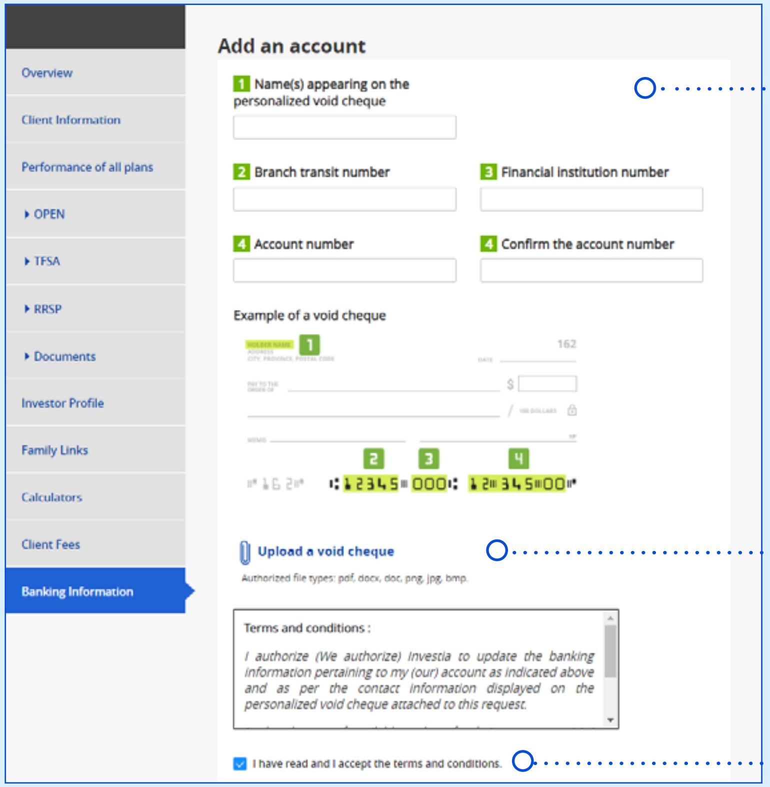


Click here to learn more about what we are doing to protect your personal information.

Add a bank account



Click here to add a bank account. Please note that a maximum of 5 bank accounts can be listed and that you must contact your advisor to modify or delete an entry.

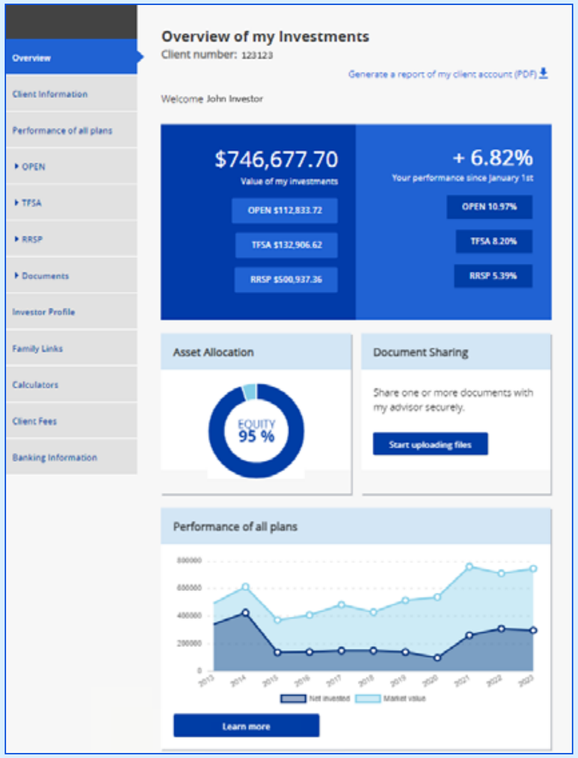


Simply complete the required fields and double-check that the numbers entered are correct.

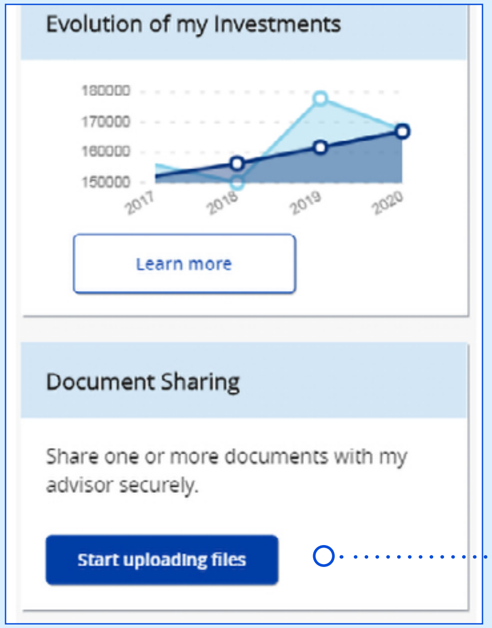
Upload a void cheque.

Don't forget to check the acceptance of terms and conditions box before saving.

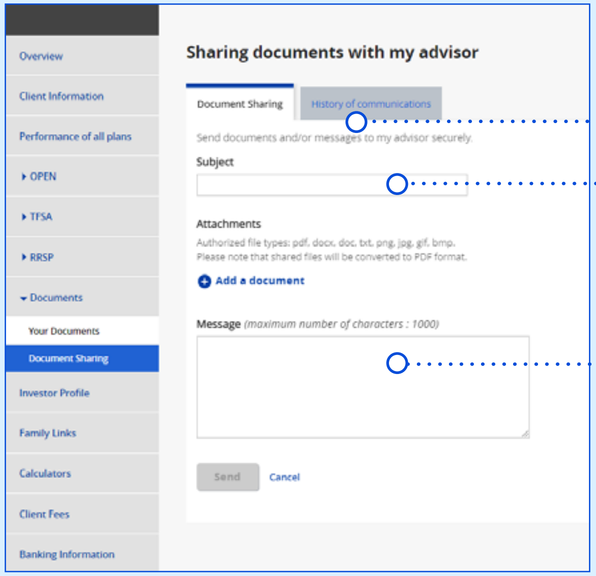
Sharing documents and/or messages with your advisor



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**.



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 also delete them in case of error.

01 Include a **Subject**

02 Add as many documents as necessary

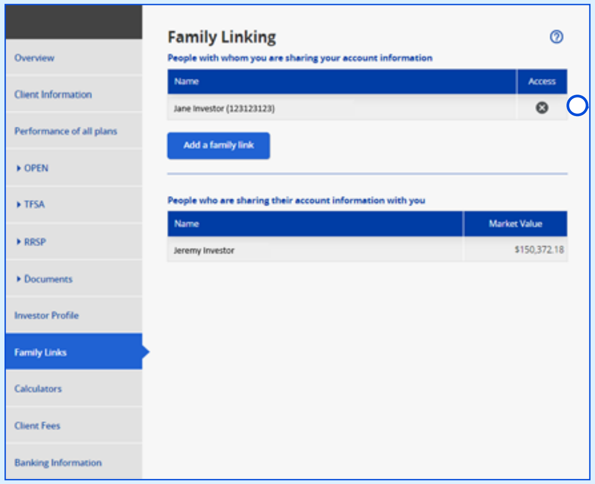
03 Add a message if applicable

04 Click on **Send**

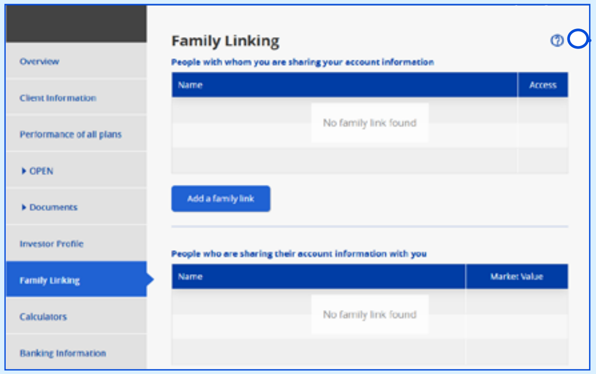
Multi-factor authentication

Please visit this page to learn how to set up multi-factor authentication to enhance the security of your account.

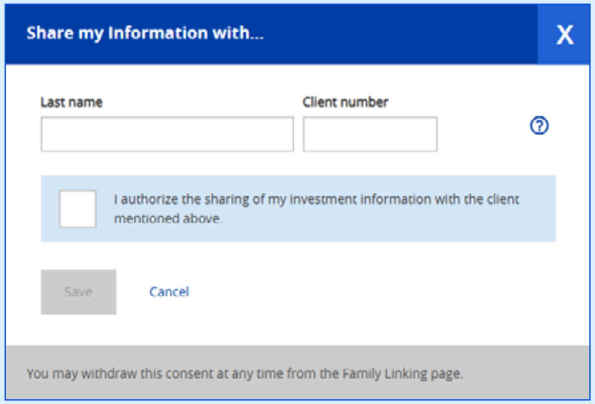
Family linking



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



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



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

Get
ahead

investia.ca

Investia
Financial Services Inc.

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