

Client Portal

Starter's Guide



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.

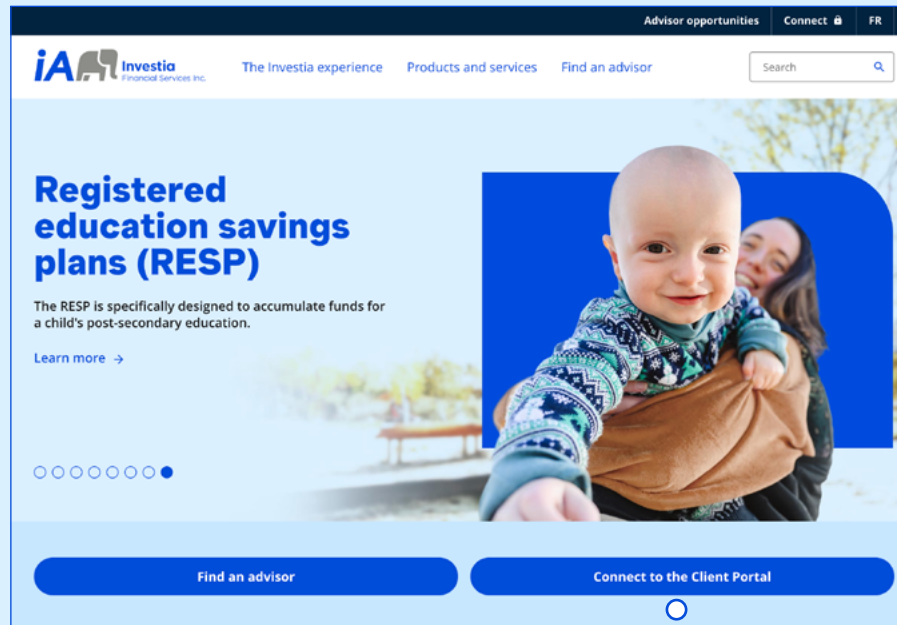
Please review this guide and contact your Investia advisor if you have any questions.

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

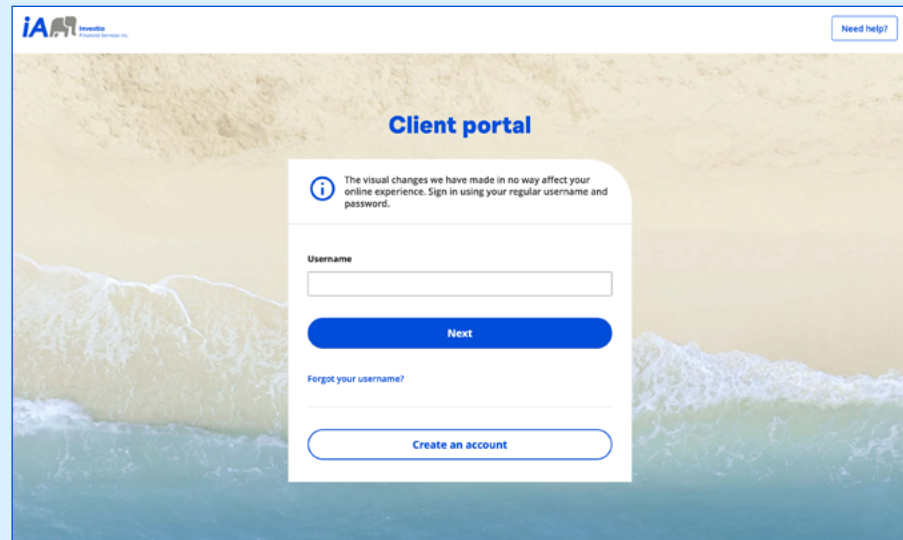


Accessing your Client Portal



Click here to sign in or create an account.

Creating your account



Click here to access useful resources.

Registering as a client

Register as a....

Client **Company**

First name Last name

First name Last name

Date of birth

Month Day Year

Country

☒ Canada
☐ International

Postal Code

AQA 0A0 ☐ My address does not have a postal code

Continue Cancel

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

Register as a....

Client

First name Last name

First name Last name

Date of birth

Month Day Year

Country

☒ Canada
☐ International

Postal Code

AQA 0A0 ☐ My address does not have a postal code

Activation key or client number

[Where can I find my activation key?](#)
[Where can I find my client number?](#)
[I don't have this information](#)

Continue Cancel

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

Register as a....

Client **Company**

Company name

Company name

Country

☒ Canada
☐ International

Postal Code

AQA 0A0 ☐ My address does not have a postal code

Do you have your activation key?

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

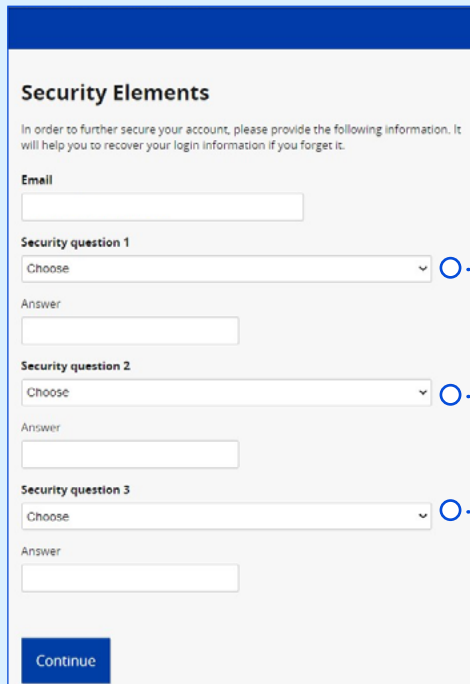
XXXX-XXXX-XXXX

Continue Cancel

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



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
Choose

Answer

Security question 2
Choose

Answer

Security question 3
Choose

Answer

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:

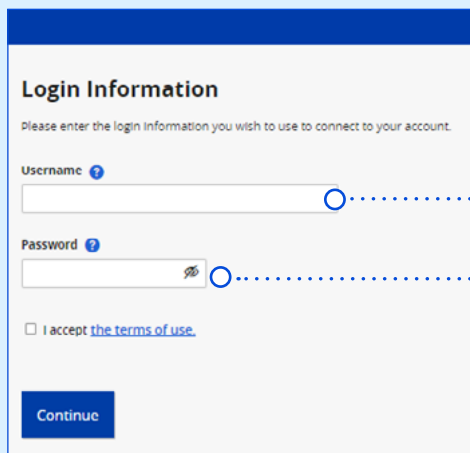
- Between 8 and 60 characters
- Different from your password
- Different from another username
- Composed of valid special characters

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.



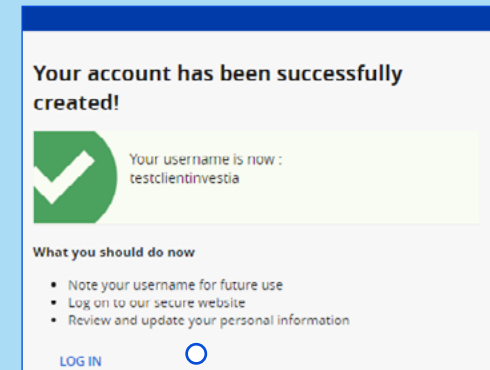
Login Information

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

Username

Password

☐ I accept [the terms of use.](#)



Your account has been successfully created!

 Your username is now : testclientinvestia

What you should do now

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

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

CLIENT PORTAL

 The visual changes we have made in no way affect your online experience. Sign in using your regular username and password.

Username

Next

[Forgot your username?](#)

[Create an account](#)

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

Then click on **Next**.

CLIENT PORTAL

 The visual changes we have made in no way affect your online experience. Sign in using your regular username and password.

Username

Password

Sign In

[Forgot your password?](#)

[Back to sign in](#)

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

Home

Log Off

Document delivery

Select your preferred document delivery options and manage email notifications. [Select all](#)

Having access to the Client Portal provides you with secure electronic delivery of your documents. Should you wish to receive your documents via mail, please uncheck the appropriate e-delivery box below.

This is applicable only to documents issued by Investia Financial Services Inc.

Statements		
Client ID	Name	All e-delivery ☒
123456789	Investia Financial Services Inc.	☒
123456789	Investia Financial Services Inc.	☒

Tax documents		
Client ID	Name	All e-delivery ☒
123456789	Investia Financial Services Inc.	☒
123456789	Investia Financial Services Inc.	☒

Transaction documents		
Client ID	Name	All e-delivery ☐
123456789	Investia Financial Services Inc.	☒
123456789	Investia Financial Services Inc.	☐

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.

Home

Log Off

Document delivery

Select your preferred document delivery options and manage email notifications. [Select all](#)

Having access to the Client Portal provides you with secure electronic delivery of your documents. Should you wish to receive your documents via mail, please uncheck the appropriate e-delivery box below.

This is applicable only to documents issued by Investia Financial Services Inc.

Statements		
Client ID	Name	All e-delivery ☒
123456789	Investia Financial Services Inc.	☒

Tax documents		
Client ID	Name	All e-delivery ☒
123456789	Investia Financial Services Inc.	☒

Registering for e-delivery

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

IA

Investia

FINANCIAL SERVICES INC.

Français

Home

Log Off

Document delivery

Select your preferred document delivery options and manage email notifications.

Select all

Having access to the Client Portal provides you with secure electronic delivery of your documents. Should you wish to receive your documents via mail, please uncheck the appropriate e-delivery box below.

This is applicable only to documents issued by Investia Financial Services Inc.

Statements

Client ID	Name	All e-delivery
		☒

Contact information

Please verify that your mailing and email addresses are correct. You can always update your addresses on the Client Information page after saving.

If your correspondence address is different from primary address, please verify this information on the Client Information page.

Modify address

Correspondence Address

☐ Same as primary address

Current address

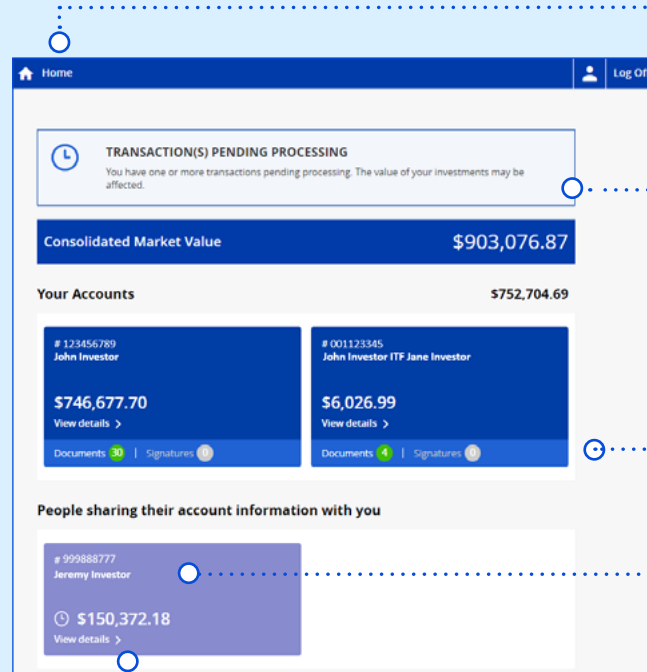
E-mail for e-delivery

Modify email

Save



Your home page



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

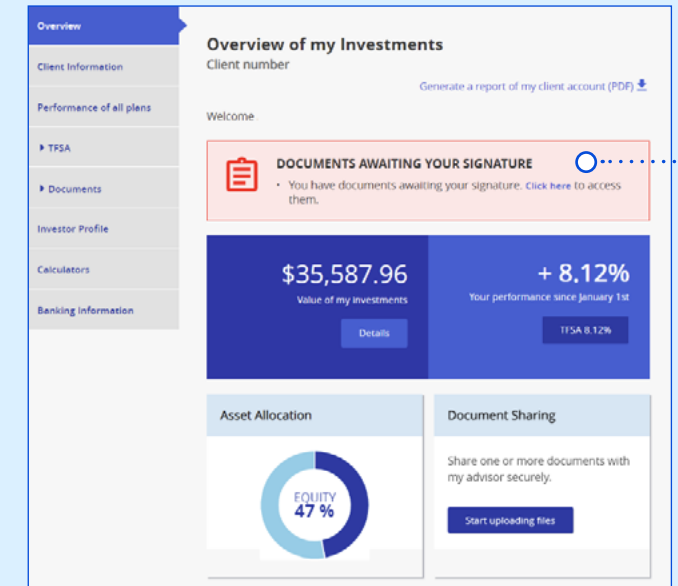
A banner will be displayed to inform you that you have one or more transactions waiting to be processed.
A similar banner may also be displayed to inform you that a document is waiting for your signature.

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

YOUR PROFILE
Personal Information
Username
Password
Secret Questions
Multifactor authentication
Personal information preferences

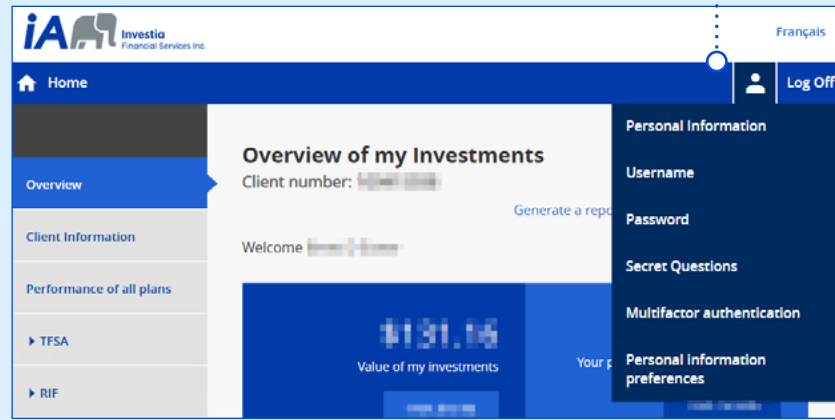
Personal Information

Identification
First name: JOHN
Last name: INVESTOR
Date of birth: 1949-01-01

Email
Primary (or home) *: John_investor@gmail.com
Primary Email Confirmation *: John_investor@gmail.com
Secondary (or work):
Secondary Email Confirmation:

Submit Reset

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

YOUR PROFILE

Personal Information

Username

Password

Secret Questions

Multifactor authentication

Personal information preferences

Username

You can change your username below, making sure to follow the requested format. Note that the new username will be effective as soon as you get confirmation that it has been entered correctly.

Identification

Primary (or home) email

John_investor@gmail.com

Copy as username

Secondary (or work) email

Copy as username

Username (email address format recommended) *

John_investor@gmail.com

Requested format :

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

Confirmation of your username *

John_investor@gmail.com

Enter your password to confirm the modification *

(*) Mandatory fields

Submit

Reset

You can change your username from here. Please refer to page 5 for detailed format requirements.

Modify your password

YOUR PROFILE

Personal Information

Username

Password

Secret Questions

Multifactor authentication

Personal information preferences

Password

Choose your password and enter it below, making sure to respect the requested format. Your password will be valid as soon as you receive confirmation that it was entered successfully.

Your password must contain **between 8 and 63 characters, including at least three of the four following types of characters:** lower case letters, upper case letters, numbers and special characters (e.g. \$, %, @, !). Your password **cannot be your username or one of your last five passwords.**

Identification

First name

JOHN

Last name

INVESTOR

Your old password *

Your new password *

Confirmation of your new password *

(*) Mandatory fields

Submit

Reset

You can change your password from here. Please refer to page 5 for detailed format requirements.

Modify your secret questions

YOUR PROFILE

Personal Information

Username

Password

Secret Questions

Multifactor authentication

Personal information preferences

Secret Questions

Your answers to secret questions must have a minimum of 4 and a maximum of 25 characters, contain numbers or letters, upper or lower case, without accents or special characters.

Question no 1 *

Who was your childhood hero?

Answer no 1 *

Question no 2 *

In what year was your father born?

Answer no 2 *

Question no 3 *

What was the first name of your favorite tea?

Answer no 3 *

(*) Mandatory fields

Submit

Reset

You can change your secret questions and answers from here.

Personal information preferences

YOUR PROFILE

Personal Information

Username

Password

Secret Questions

Multifactor authentication

Personal information preferences

Personal information preferences

We wish to collect, use and disclose some of your personal information to get to know you better and understand your needs, interests and preferences. By agreeing, you enable us to be proactive in:

Improving our products and services and providing a distinctive client experience.

I agree

I decline

Keeping you informed of our promotions, products, services, contests and events that may be of interest to you.

I agree

I decline

You may review your choices at any time.

We want to inform you.

Under certain conditions, we may disclose your personal information including to third party, if and only if this disclosure:

is necessary to serve you, or

is made in respect of the choices you have made, or

is in accordance with the law.

We are committed to sharing only necessary information.

To learn more, please refer to the [Privacy Notice](#).

Save

Cancel

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

Add a bank account

Overview

Client Information

Performance of all plans

▶ OPEN

▶ TFSA

▶ RRSP

▶ Documents

Investor Profile

Family Links

Calculators

Client Fees

Banking Information

Banking Information

Account(s) already on file

Bank of Montreal
Account number: ***5724

ATB Financial
Account number: *****9501

Manulife Bank
Account number: ***9793

To update your banking information, please [contact](#) your advisor.

+

Add an 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.

Overview

Client Information

Performance of all plans

► OPEN

► TFSA

► RRSP

► Documents

Investor Profile

Family Links

Calculators

Client Fees

Banking Information

Add an account

1 Name(s) appearing on the personalized void cheque

2 Branch transit number

3 Financial Institution number

4 Account number

4 Confirm the account number

Example of a void cheque

1

12345678901234567890

CITY PROVINCE POSTAL CODE

DATE

162

PAID TO THE ORDER OF

\$

/ 100 DOLLARS

MEMO

2

3

4

⑈ 1 2 3 4 5 0 0 0 ⑈ 1 2 3 4 5 0 0 0 ⑈

Upload a void cheque

Authorized file types: pdf, docx, doc, png, jpg, bmp.

Terms and conditions :

I authorize (We authorize) Investia to update the banking information pertaining to my (our) account as indicated above and as per the contact information displayed on the personalized void cheque attached to this request.

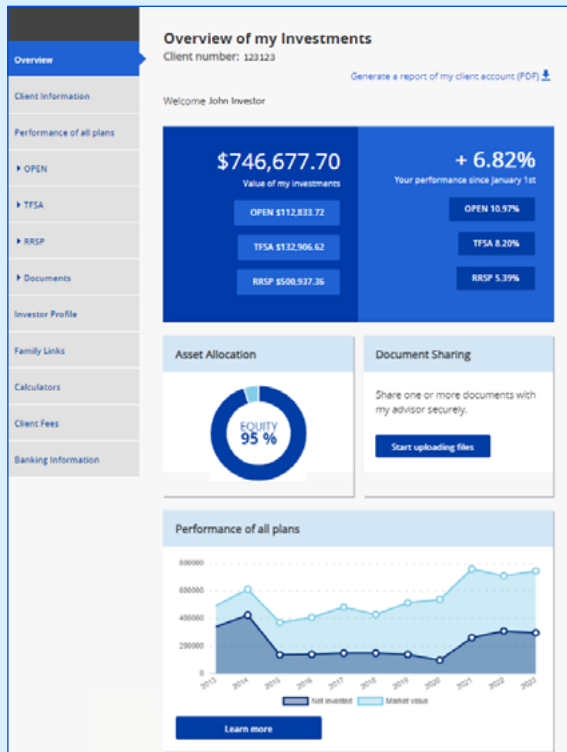
☒ I have read and I accept the terms and conditions.

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

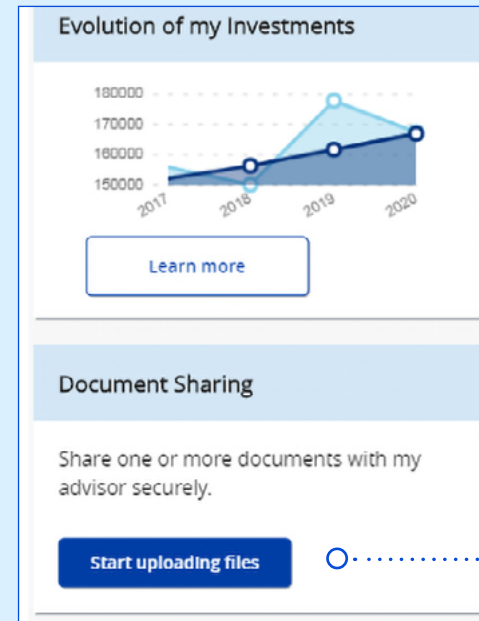
Upload a void cheque.

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.**

Multi-factor authentication

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

Sharing documents with my advisor

Document Sharing | History of communications

Send documents and/or messages to my advisor securely.

Subject

Attachments
Authorized file types: pdf, docx, doc, txt, png, jpg, gif, bmp.
Please note that shared files will be converted to PDF format.

+ Add a document

Message (maximum number of characters : 1000)

Send Cancel

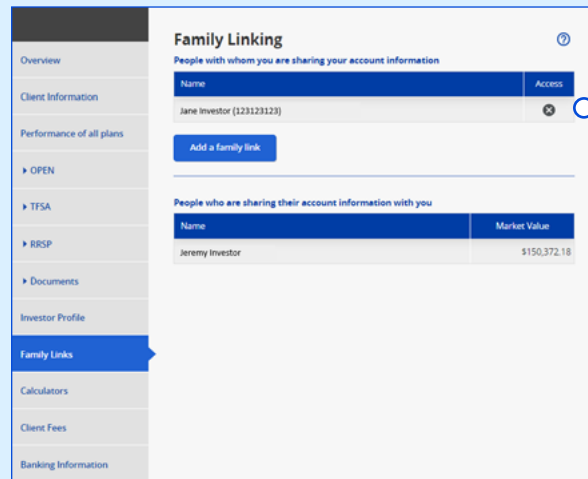
To view a history of documents and messages you've shared, click on **Document Sharing and History of Communications**.

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**

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

Family linking



Family Linking ⓘ

People with whom you are sharing your account information

Name	Access
Jane Investor (123123123)	✖ ⓘ

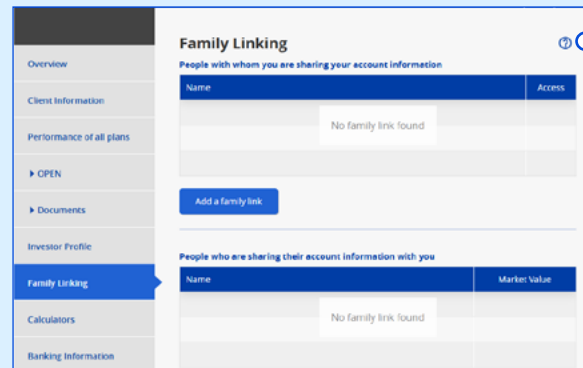
[Add a family link](#)

People who are sharing their account information with you

Name	Market Value
Jeremy Investor	\$150,372.18

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➤ TFSA
➤ RRSP
➤ Documents
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Client Fees
Banking Information

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



Family Linking ⓘ

People with whom you are sharing your account information

Name	Access
No family link found	

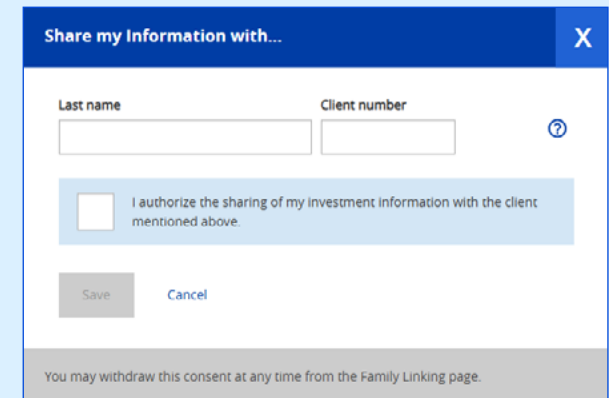
[Add a family link](#)

People who are sharing their account information with you

Name	Market Value
No family link found	

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



Share my Information with... X ⓘ

Last name Client number

☐ I authorize the sharing of my investment information with the client mentioned above.

[Save](#) [Cancel](#)

You may withdraw this consent at any time from the Family Linking page.

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

Get
ahead

investia.ca