# Your Client Portal starter's guide

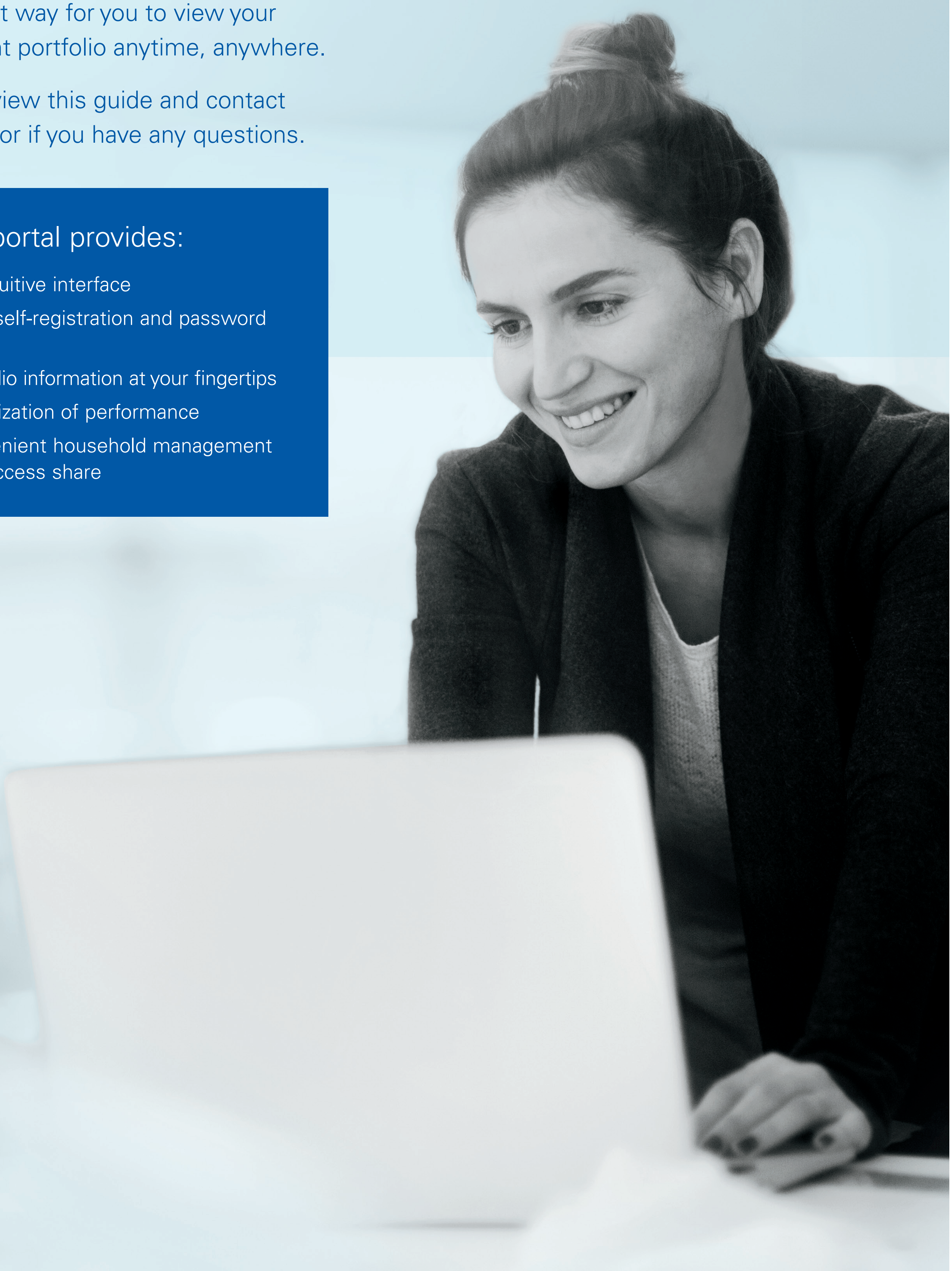
iA Securities

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.

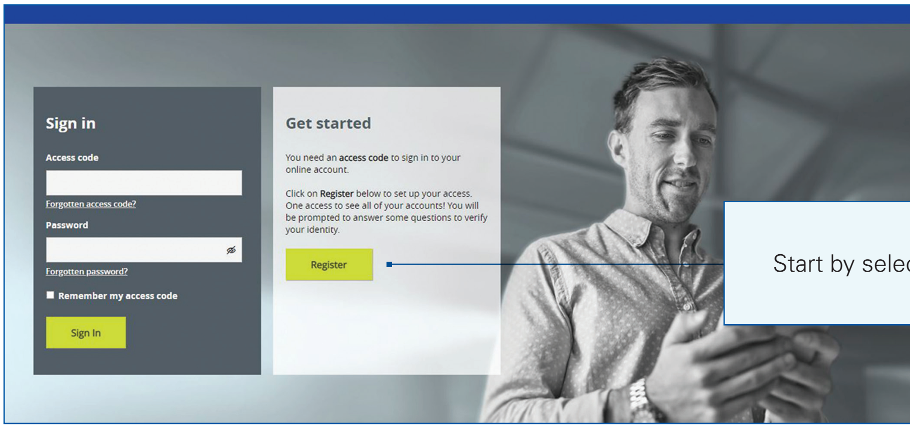
## Your portal provides:

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



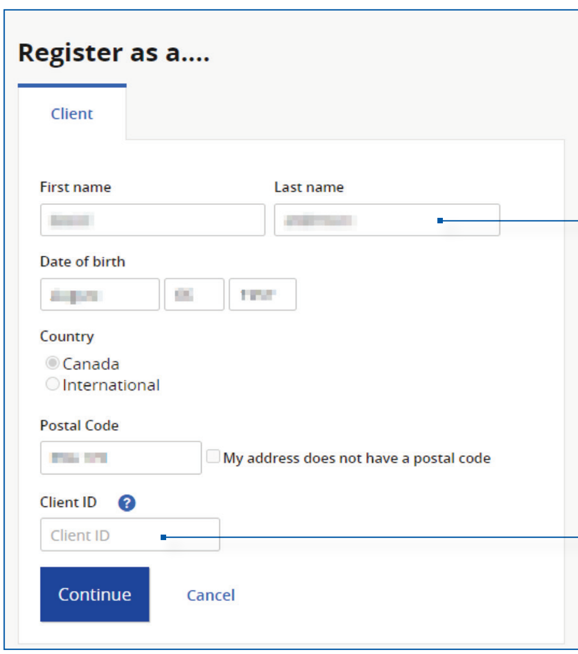
# Registering and setting up your access

## Register your account




Start by selecting **Register**.

## Registering as a client



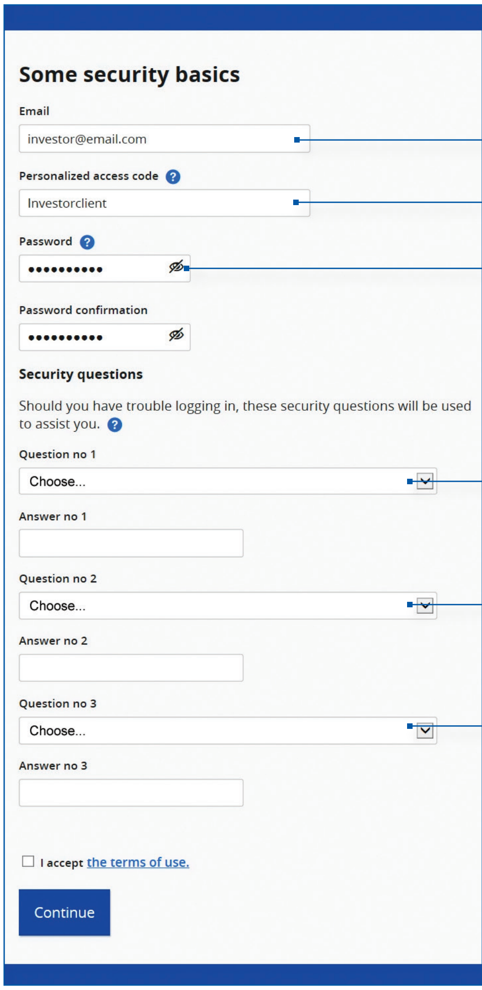

Provide the required information as it appears on your investment portfolio statement.

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



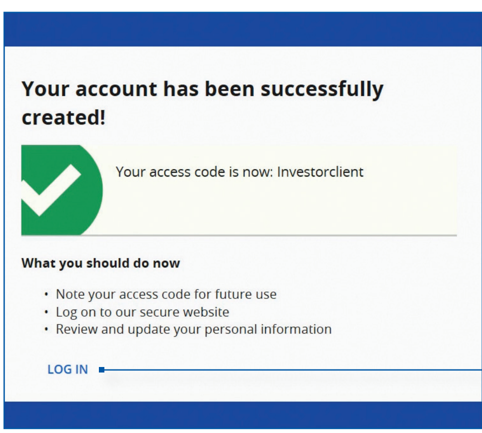

To register an account, you will need to provide an email address, choose an access code and a password. Your **access code** must be:

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

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.

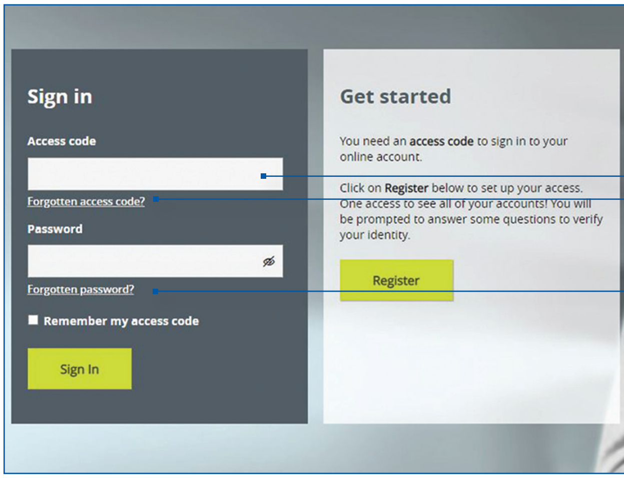
Select 3 security questions to be able to reset your **access code** or **password** later.




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.

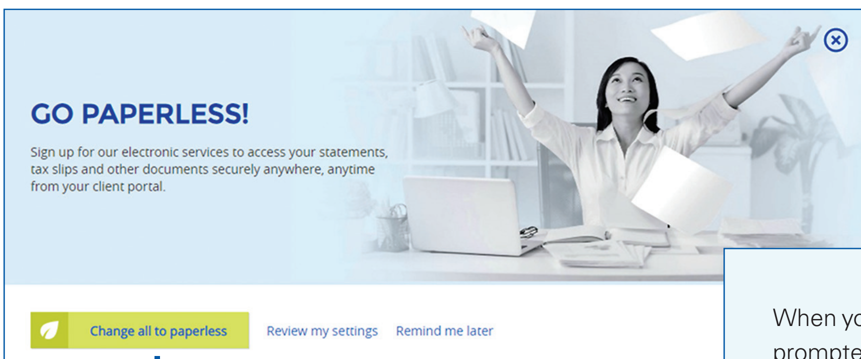
## Signing in




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




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.

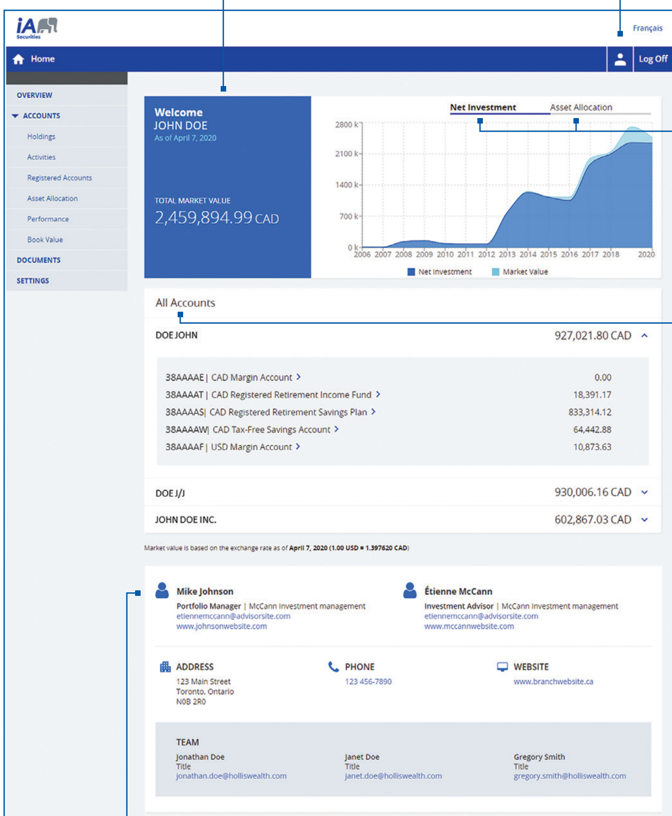
# Navigating your investment portfolio

## Your account overview

Consolidated market value of your household.

Change your account configuration:

- View personal information and update email
- Change personalized access code for the portal
- Update password
- Modify secret questions and answers

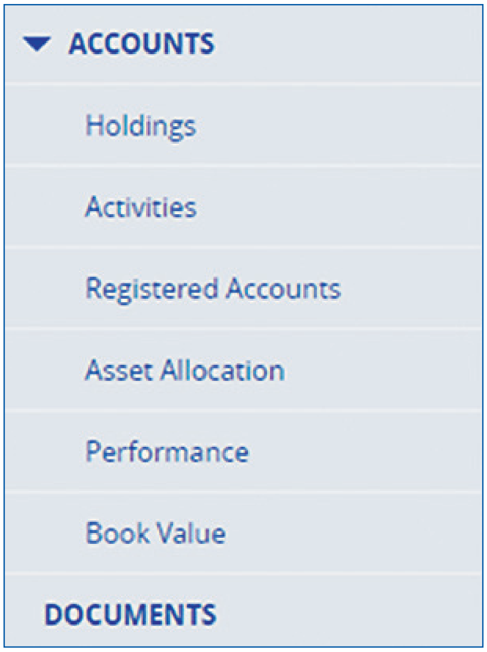



Net invested progression and asset allocation graphs.

All your accounts and any shared accounts are displayed here. You can manage which accounts to see on Settings > Household.

Advisor contact information.

## View detailed account information




**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.

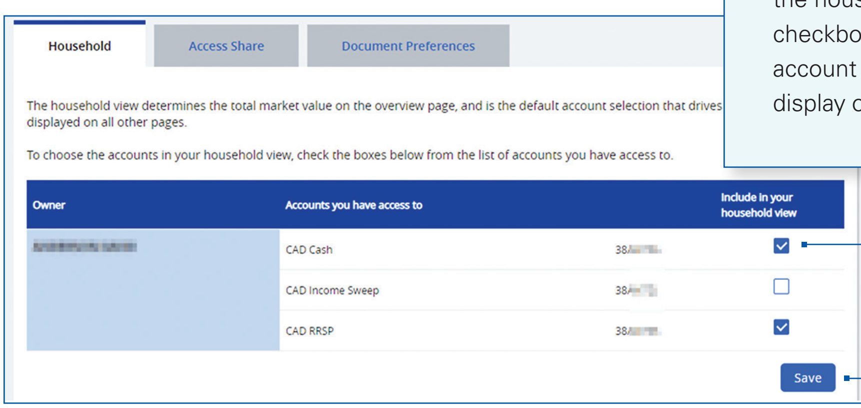
**Asset Allocation:** detailed breakdown of asset allocation at the household level. You can see how each investment holding is categorized and its respective weighting in the portfolio.

**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

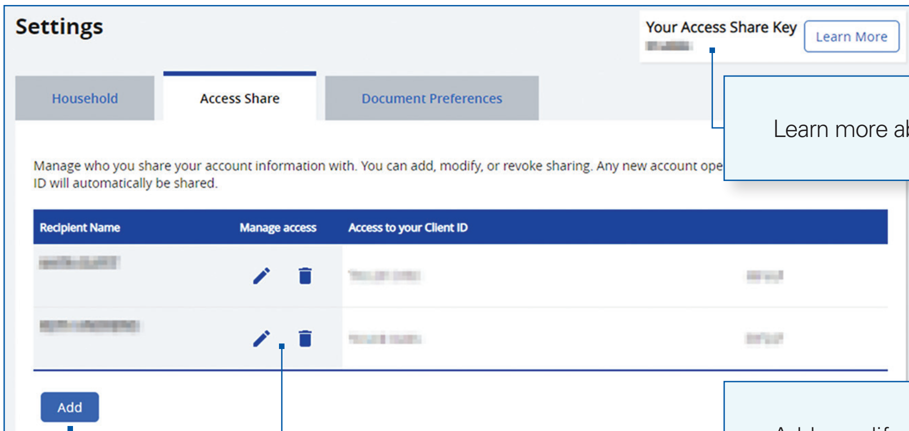



Select the accounts to be included in the household view by clicking on the checkbox. Household view is the default account filter that drives information display on the Overview and other pages.

Click on Save to apply changes.

## Manage access share

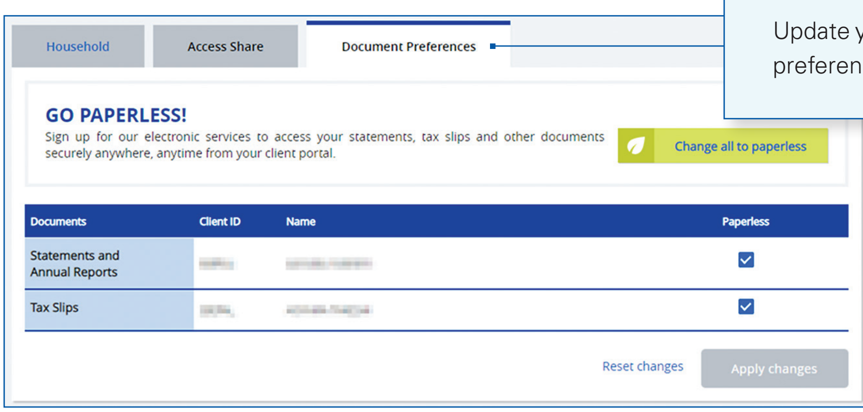
Use this self-serve function to share account information with another iA Securities client. To share with a third party who is not an iA Securities client, please contact Client Support at 1-866-384-5840.




Learn more about how access share works.

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

## Manage document preferences




Update your document delivery preferences here.

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

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