



# CLIENT PORTAL

Starter's Guide

The Client Portal at [client.investia.ca](http://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.

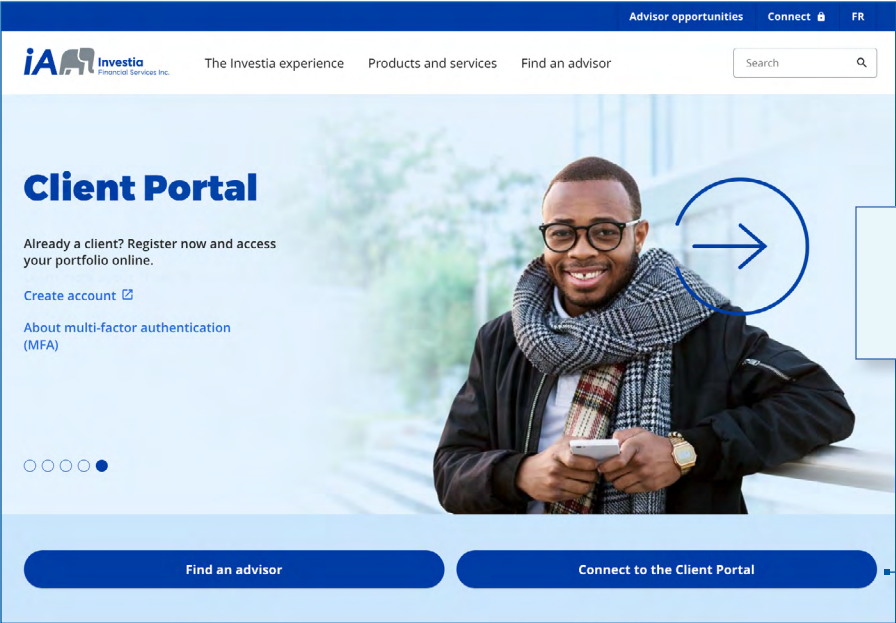
### Your portal provides:

- 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



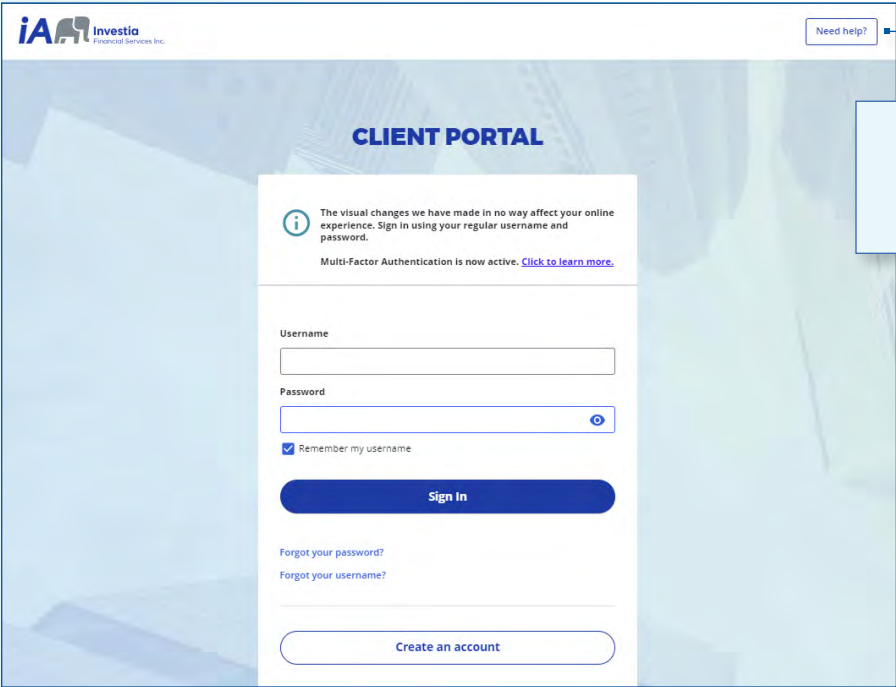
# CREATING AND SETTING UP YOUR PROFILE

## 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

ADA 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

ADA 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

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

Click here to get your activation key.

# Registering as a company

**Register as a....**

Client | **Company**

Company name

Country  
 Canada  
 International

Postal Code  
  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.

**Continue** Cancel

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

### 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.

### 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 **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.**

### 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

[LOG IN](#)

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.  
Multi-Factor Authentication is now active. [Click to learn more.](#)

Username

Password

Remember my username

**Sign In**

[Forgot your password?](#)  
[Forgot your username?](#)

**Create an account**

Enter the username you chose during the account creation process.

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

## Registering for e-delivery

**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	Monthly Fee	<input checked="" type="checkbox"/>
987654321	Monthly Fee (SP Resubmission)	<input checked="" type="checkbox"/>

Tax documents		
Client ID	Name	All e-delivery
123456789	Monthly Fee	<input checked="" type="checkbox"/>
987654321	Monthly Fee (SP Resubmission)	<input checked="" type="checkbox"/>

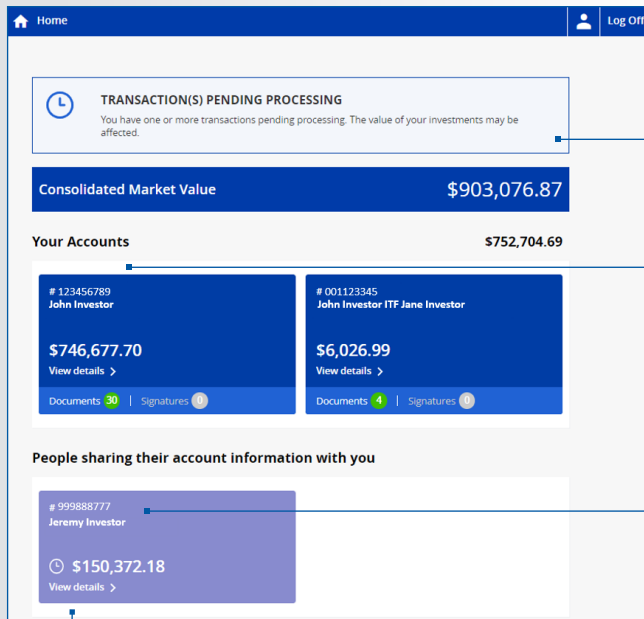
Transaction documents		
Client ID	Name	All e-delivery
123456789	Monthly Fee	<input checked="" type="checkbox"/>
987654321	Monthly Fee (SP Resubmission)	<input type="checkbox"/>

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.

# NAVIGATING YOUR INVESTMENT PORTFOLIO

## Your home page



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

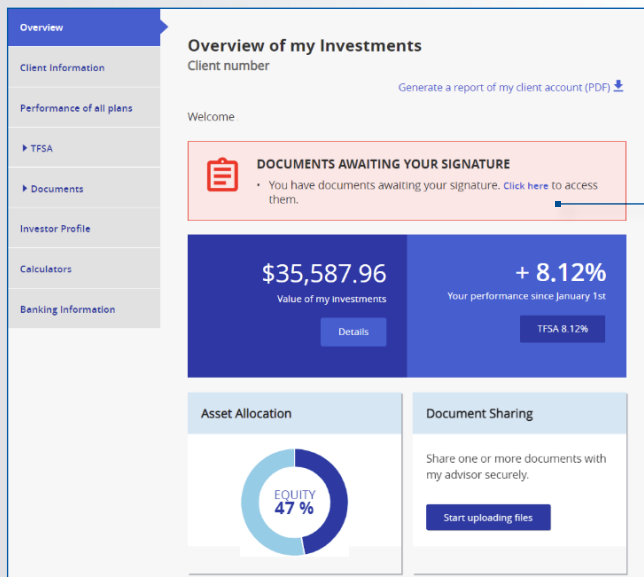
A banner will be displayed to inform you that you have one or more transactions waiting to be processed. A similar banner may also be displayed to inform you that a document is waiting for your signature.

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.

## Investments overview



This notification will appear when documents are awaiting your signature.



# YOUR PROFILE

## 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) *	<input type="text" value="John_investor@gmail.com"/>
Primary Email Confirmation *	<input type="text" value="John_investor@gmail.com"/>
Secondary (or work)	<input type="text"/>
Secondary Email Confirmation	<input type="text"/>

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

## 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 <a href="#">Copy as username</a>
Secondary (or work) email	<input type="text"/> <a href="#">Copy as username</a>
Username (email address format recommended) *	<input type="text" value="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 *	<input type="text" value="John_investor@gmail.com"/>
Enter your password to confirm the modification *	<input type="password"/>

(\*) Mandatory fields

You can change your username from here. Please refer to page 6 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 *	<input type="password"/>
Your new password *	<input type="password"/>
Confirmation of your new password *	<input type="password"/>

(\*) Mandatory fields

**Submit**   Reset

You can change your password from here. Please refer to page 6 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.**

#### Secret Questions

Question no 1 *	Who was your childhood hero? ▼
Answer no 1 *	<input type="text"/>
Question no 2 *	In what year was your father born? ▼
Answer no 2 *	<input type="text"/>
Question no 3 *	What was the first name of your favorite tee ▼
Answer no 3 *	<input type="text"/>

(\*) 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

**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.

**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

[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

**Overview of my Investments**  
Client number: 123123

Welcome John Investor

Generate a report of my client account (PDF)

**\$746,677.70**  
Value of my investments

**+ 6.82%**  
Your performance since January 1st

Account Type	Value	Performance
OPEN	\$112,833.72	10.97%
TFSA	\$132,906.62	8.20%
RRSP	\$500,937.36	5.39%

**Asset Allocation**  
EQUITY 95%

**Document Sharing**  
Share one or more documents with my advisor securely.  
[Start uploading files](#)

**Performance of all plans**  
Line chart showing performance from 2013 to 2021. Legend: Not invested (dark blue), Market value (light blue).  
[Learn more](#)

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**.

**Evolution of my Investments**

Line chart showing investment evolution from 2017 to 2020. Y-axis ranges from 150,000 to 180,000.

[Learn more](#)

**Document Sharing**

Share one or more documents with my advisor securely.

[Start uploading files](#)

**NEW INVESTMENT STATEMENT ON YOUR CLIENT PORTAL**  
[Click here to view more](#)

You can also upload documents from your smartphone or tablet.

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.

1. Include a **Subject**
2. Add as many documents as necessary
3. Add a message if applicable
4. Click on **Send**

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

## Family linking

Name	Access
Jane Investor (123123123)	✕

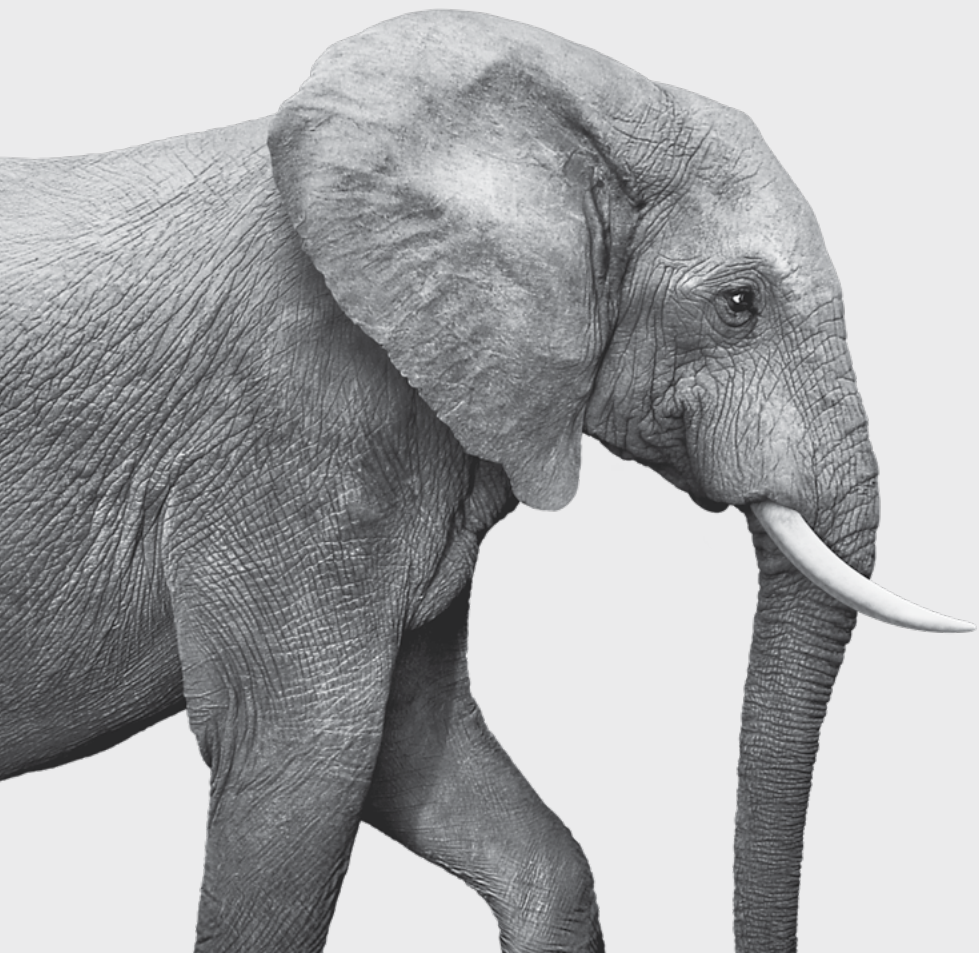
  

Name	Market Value
Jeremy Investor	\$150,372.18

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.**



F51-431A (24-04)

**INVESTED IN YOU.**

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

---

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.