



CLIENT PORTAL STARTER'S GUIDE

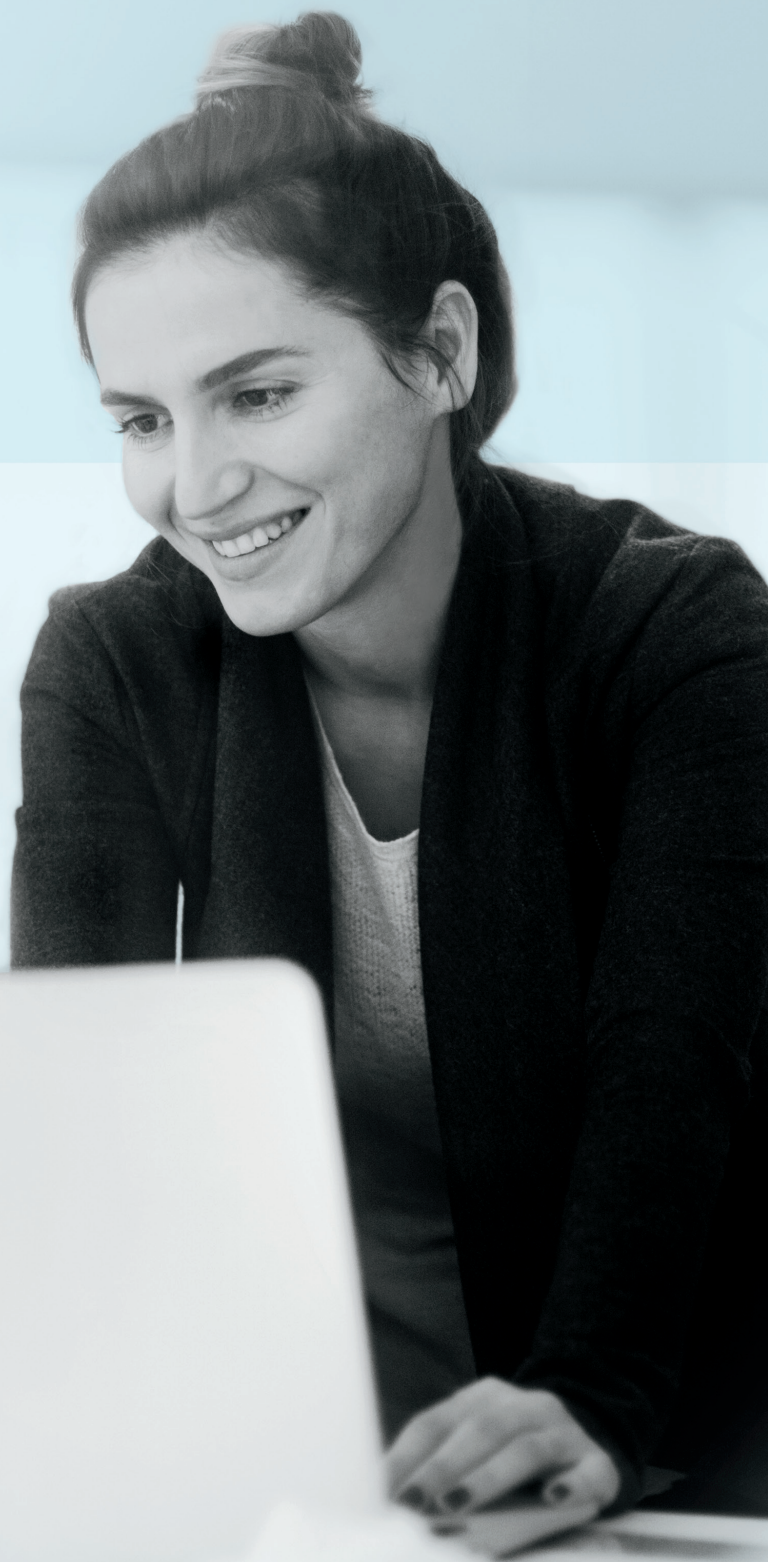
The Investia Client Portal provides you with a quick, easy and user-friendly way to view your portfolio and investor profile information and contact your Representative... and much more!

Benefits

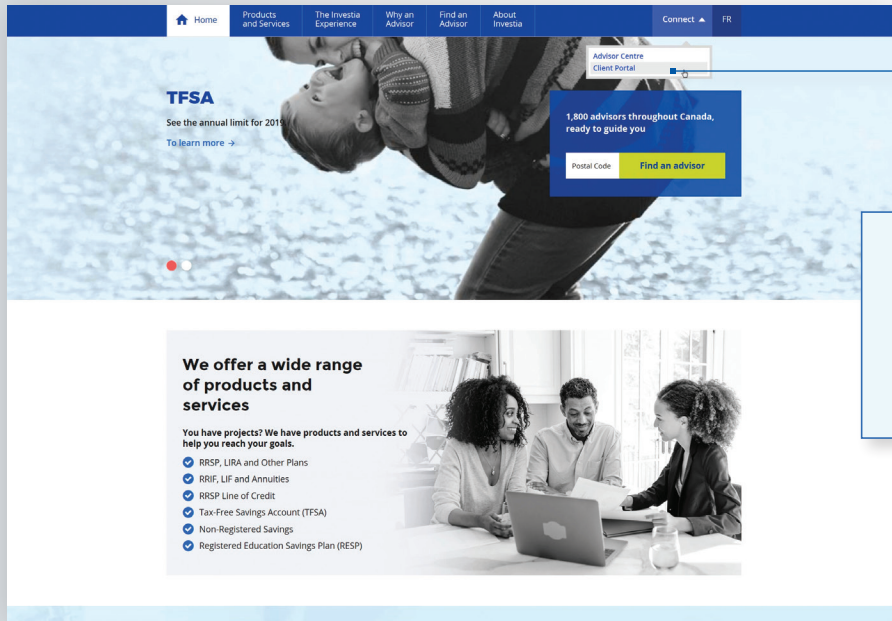
Investia Client Portal

- Improved modern look and feel
- Intuitive interface
- Adapted to new technologies (mobile friendly)
- At-a-glance access to your complete financial information
- Access to your investor profile
- Access to easy-to-use financial calculators
- Possibility to change your contact information
- Access to your Representative's contact information

Client Number:

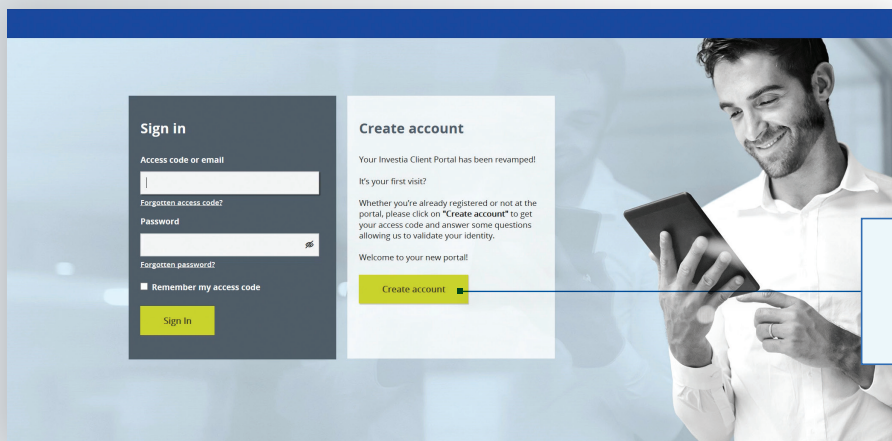


Access your Client Portal



Go to **Investia.ca**, click on **Connect**, and then on **Client Portal**.

First visit?



Click on **Create account**.

Identify yourself

(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 [?](#)

Activation key [?](#)

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

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

Register using your **client number** (as it appears on your quarterly statement or as provided by your Representative) or ask for the **activation key**.

(as a company)

Register as a....

Client Company

Company name

Postal code for correspondence
A0A 0A0 Canada

Do you have your activation key? [?](#)

Yes, I have my activation key.
 - -

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

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

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

Security questions

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...

Answer no 1

Question no 2
Choose...

Answer no 2

Question no 3
Choose...

Answer no 3

I accept [the terms of use](#).


Continue

We recommend that you use your **email address** as your access code. If your email is taken by another user, you may create a **different access code**.

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

End of registration

Your account has been successfully created!

 Your access code is now: Investorclient

What you should do now

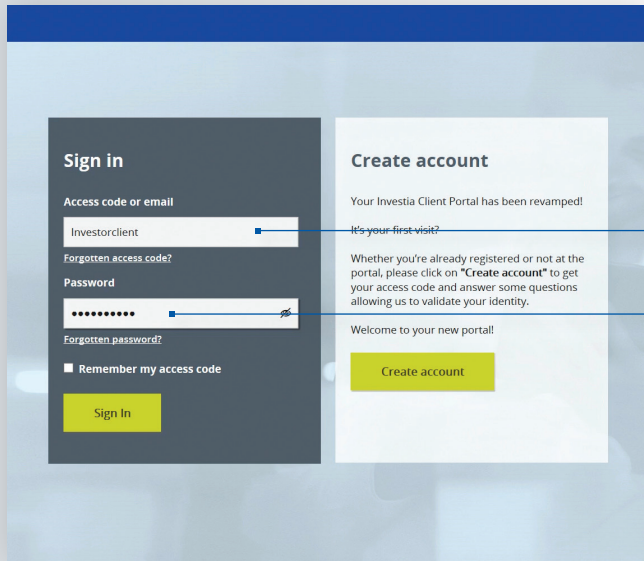
- Note your access code for future use
- Log on to our secure website
- Review and update your personal information

LOG IN

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

You are now ready to use the Client Portal!

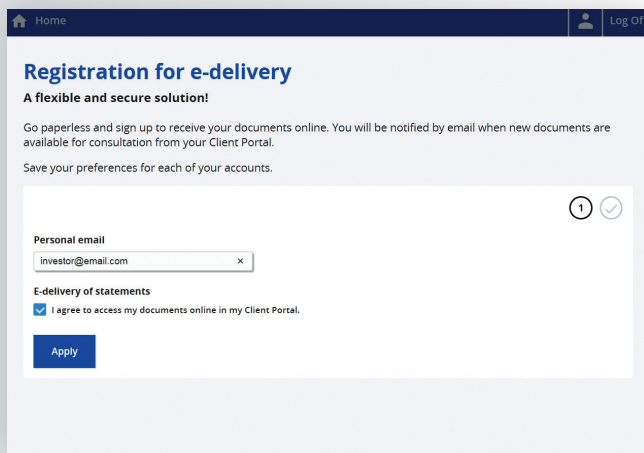
Connection



Your registration is complete. Use your access code and password to log into the Client Portal.

If you forget your access code or password, click here to securely reset them.

Registration for electronic delivery of documents



⚠ Upon your 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 "Client information" section.

Homepage

987654321

Home Log Off

Consolidated Market Value **\$249,352.36**

Your Accounts

JANE INVESTOR \$148,934.35

Account Name	ID	Balance
JANE INVESTOR	123456789	\$136,269.71
CLIENT INVESTOR & JOHN INVESTOR	222333444	\$12,664.64

People sharing their account information with you

Account Name	ID	Balance
JOHN INVESTOR	98765432	\$100,418.01

All your accounts are displayed here. Click on the **desired account** to obtain an overview of information.

All your **shared accounts** are displayed here.

Overview

Home Log Off

Overview of my Investments

Client number: 123456789 Generate a report of my client account (PDF)

Welcome Client Investor

DOCUMENTS AWAITING YOUR SIGNATURE

You have documents awaiting your signature. [Click here to access them.](#)

\$136,269.71
Value of my investments

Account Type	Balance
OPEN	\$56,808.74
TFSA	\$47,853.38
RRSP	\$31,607.59

Asset Allocation

EQUITY 85%

Evolution of my Investments

Year	Value
2016	120,000
2017	125,000
2018	130,000
2019	136,269.71

[Learn more](#)

YOUR CLIENT PORTAL HAS BEEN REVAMPED! [Watch the video](#)

IA Investia

You now have access to your Client Portal and may take advantage of all its benefits.

Client information

Home | Log Off

Addresses

Primary Address

Current address
65 Rue Front St
Toronto ON M5J1E6
Canada

Change your Address

Correspondence Address

Same as primary address

Telephones

Main Residence: 4186845548 Ext.

Cell: Ext.

Business: Ext.

Fax: Ext.

Emails

Personal Email*

Office Email:

Electronic Delivery of Documents

Email Notification: Yes No

Update Reset

You may update your contact information here.

You may update your email preferences here.

Family links

Home | Log Off

Family Linking

People with whom you are sharing your account information

Name	Access
JOHN CLIENT (999888777)	-

Add a family link

People who are sharing their account information with you

Name	Market Value
No link found	

You may share access to one or more of your accounts with a third party.



INV (10-2019)

INVESTED IN YOU.

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investia.ca