iA Investia
Financial Services Inc.

YOUR WEALTHVIEW CLIENT PORTAL STARTER'S GUIDE

The Wealthview Client Portal at client.fundex.com offers a simple and convenient way for you to view your investment portfolio and investor profile information anytime, anywhere.

Please contact your advisor if you have any questions.

Your Wealthview Client Portal provides:

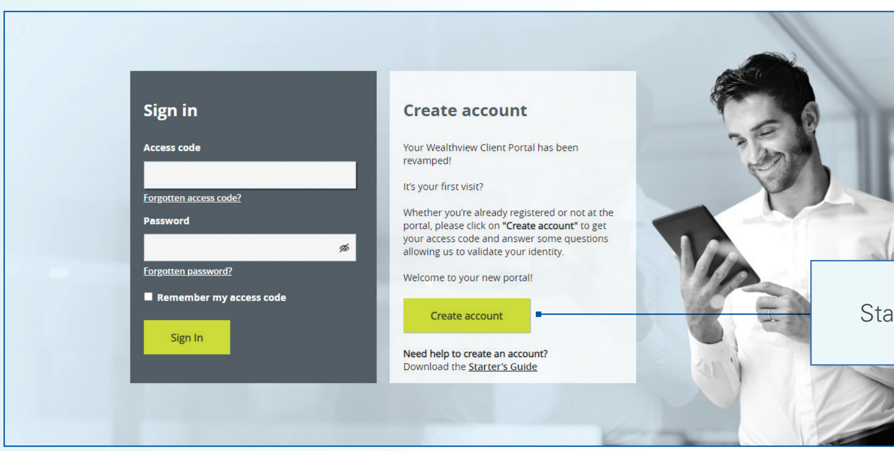
- An intuitive interface
- Mobile friendly access
- Up-to-date financial information
- Access to your investor profile
- Easy-to-use financial calculators
- Convenient way to update contact information
- A secure method of sharing information and documents with your advisor

REGISTERING AND SETTING UP YOUR PROFILE

Accessing your Wealthview Client Portal

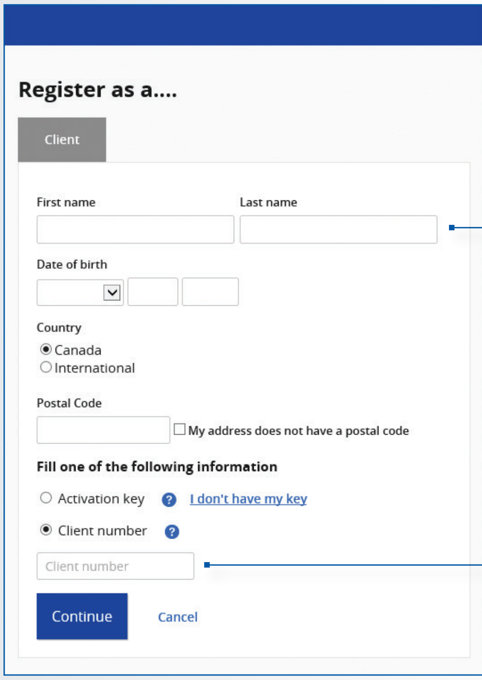
1. Visit **fundex.com**
2. Click **Client Access**

Creating your account



Start by selecting **Create account**.

Registering as a client



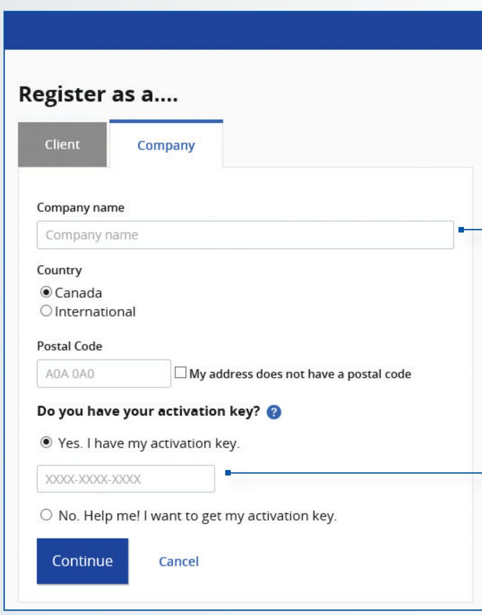
Provide the required information as it appears on your quarterly statement.

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

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

*Except for corporate accounts

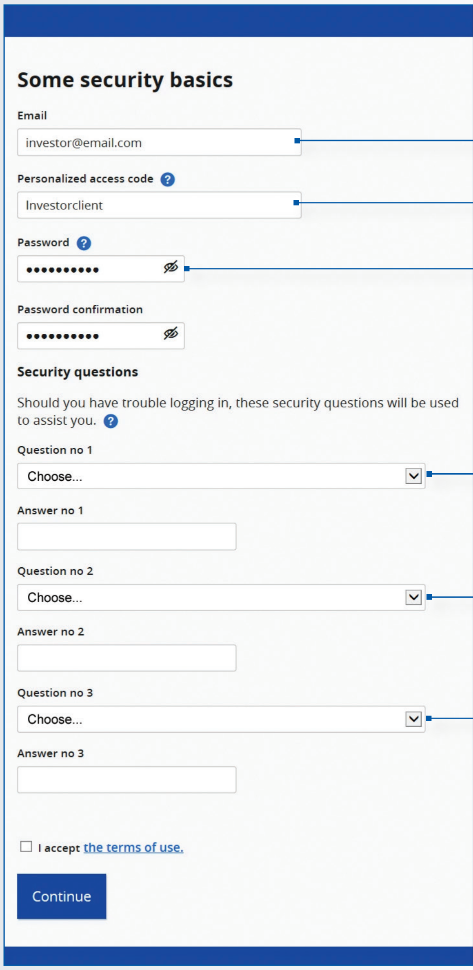
Registering as a company



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



To register an account, you will need an email address or personalized access code and a password. If you choose to use an **access code**, it must be:

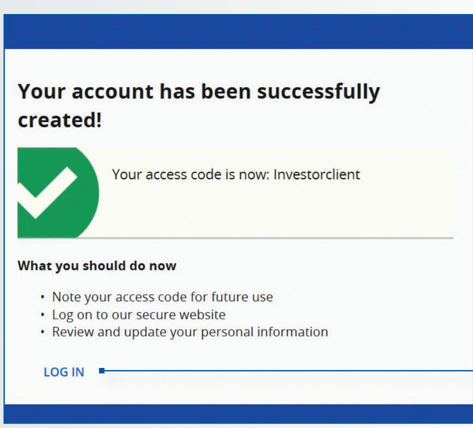
- Unique and from 8 to 15 characters
- Different from your password
- Different from other personalized access codes
- Composed of special characters

Your access code can be changed at any time in the account configuration section. If it is used by another user, please create a different access code.

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.

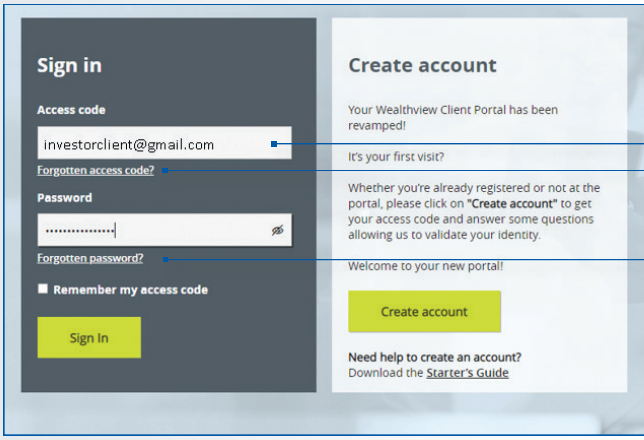
Select 3 security questions to be able to reset your **access code** or **password** later.



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.

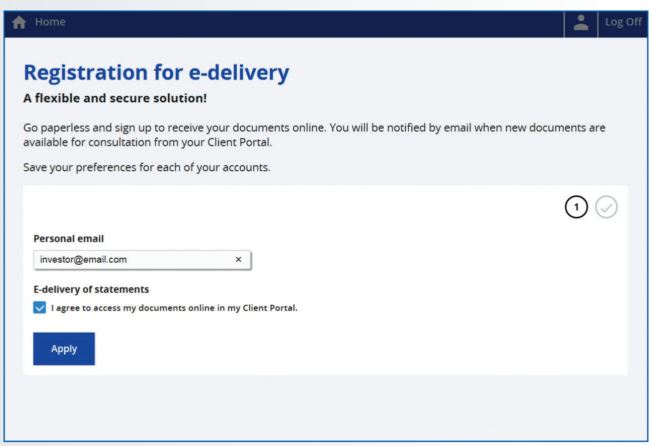
Signing in



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 e-delivery

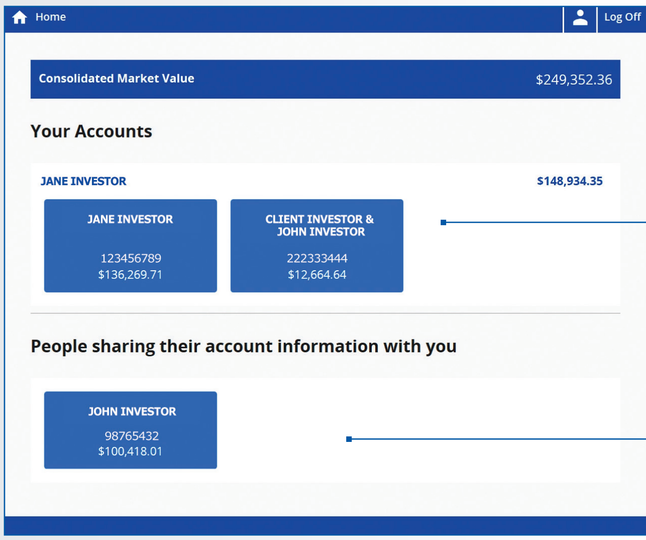


When you first login, you will be prompted to choose between receiving your documents electronically or in paper format.

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

NAVIGATING YOUR INVESTMENT PORTFOLIO

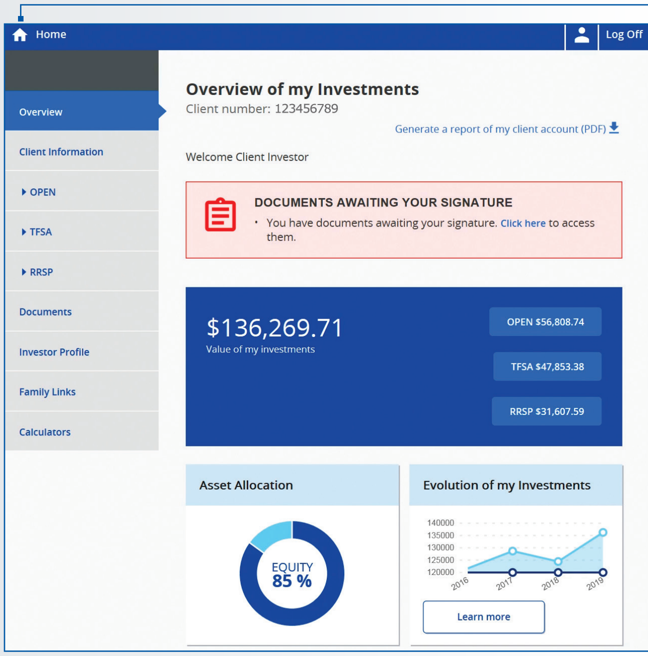
Your home page



All your accounts are displayed here. Click on an account for an overview. If you have only one account, this account tile will not be visible.

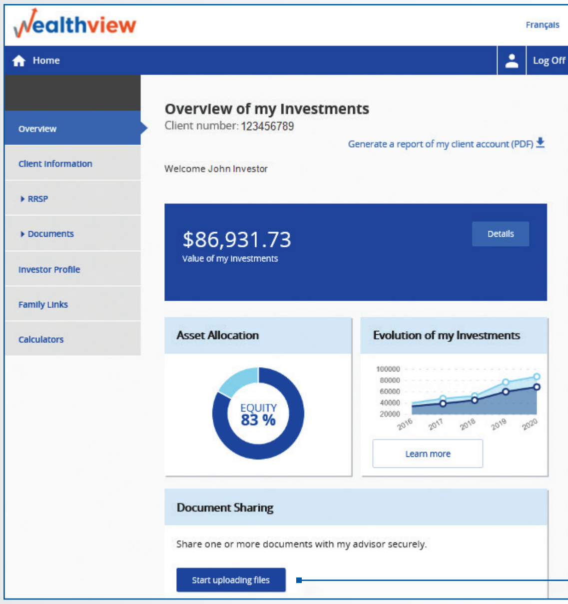
Accounts sharing their information with you are displayed here.

Your account overview



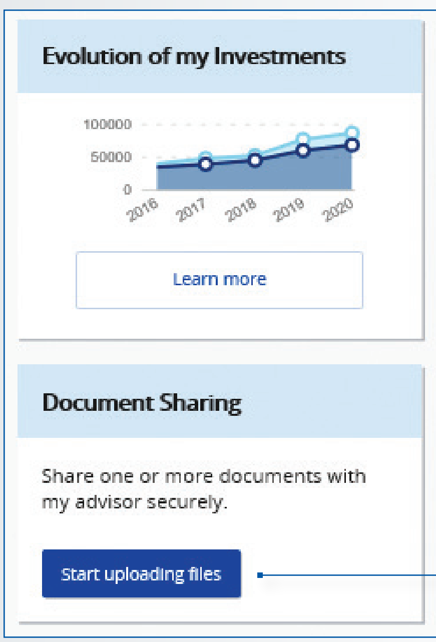
To view another account, click on **Home** to go back to the Accounts page.

Sharing documents/messages with your advisor

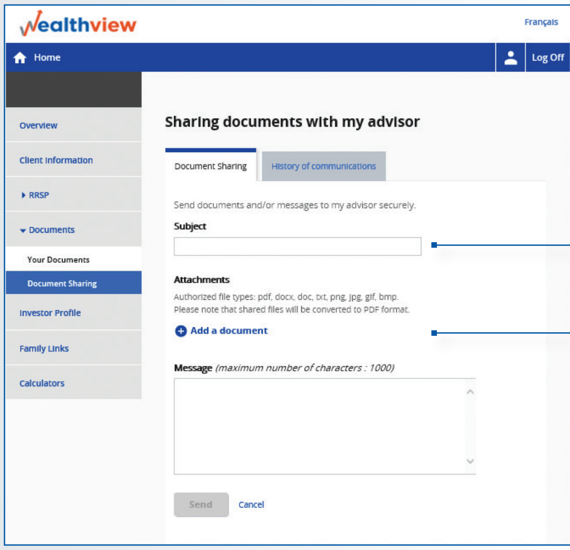


The security of your information is our priority. We encourage you to take advantage of the document/message sharing options.

To begin, from the Wealthview Client Portal main screen, click on **Start uploading files**.



You can also upload documents from your smartphone or tablet.



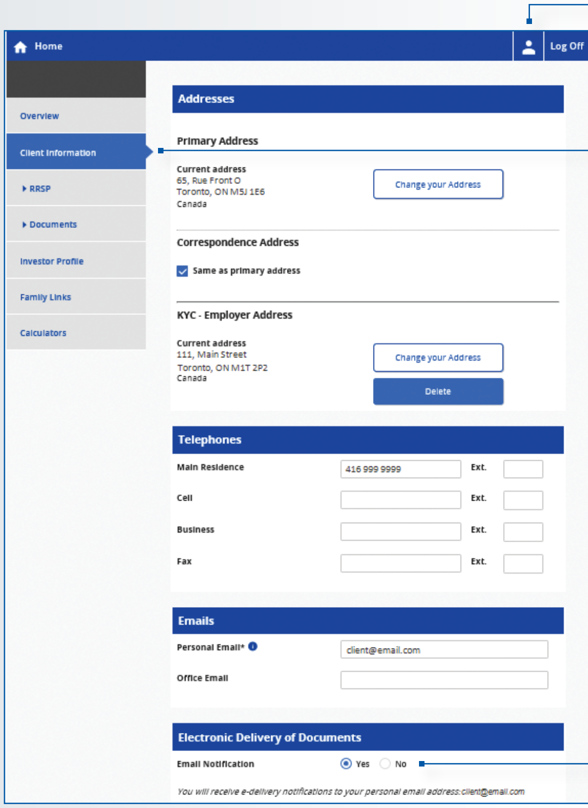
1. Include a **subject**
2. Add as many documents as necessary
3. You can also add a message to your advisor if applicable
4. Click on Send

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 consult documents and messages sent and/or delete them in case of a mistake.

Managing your information

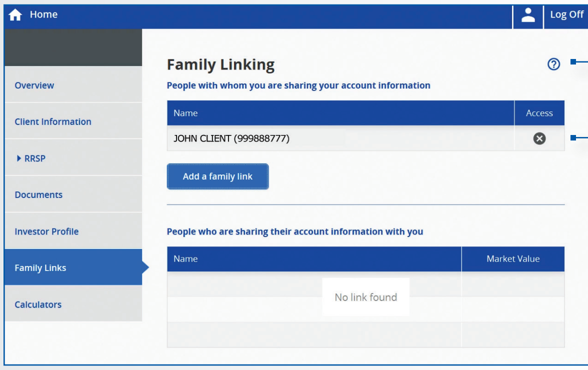


You can change your account information and/or options such as your password, access code, etc. here.

Update your contact information here.

Update your document e-delivery preferences here.

Connecting family members



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 advisor.

Notes:

About Investia

Investia Financial Services Inc. is a mutual fund dealer that offers a complete line of financial products and services. Our advisors place their expertise at your service to make your projects a reality.

Investia is a wholly-owned subsidiary of iA Financial Group, the fourth largest life and health insurance company in Canada and one of the largest publicly-traded companies in the country. Industrial Alliance stock is listed on the Toronto Stock Exchange under the ticker symbol IAG.

Investia and iA Financial Group share values that will take you far:
service, performance, teamwork.

For more information, please contact your advisor.

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