



Investia

Financial Services Inc.

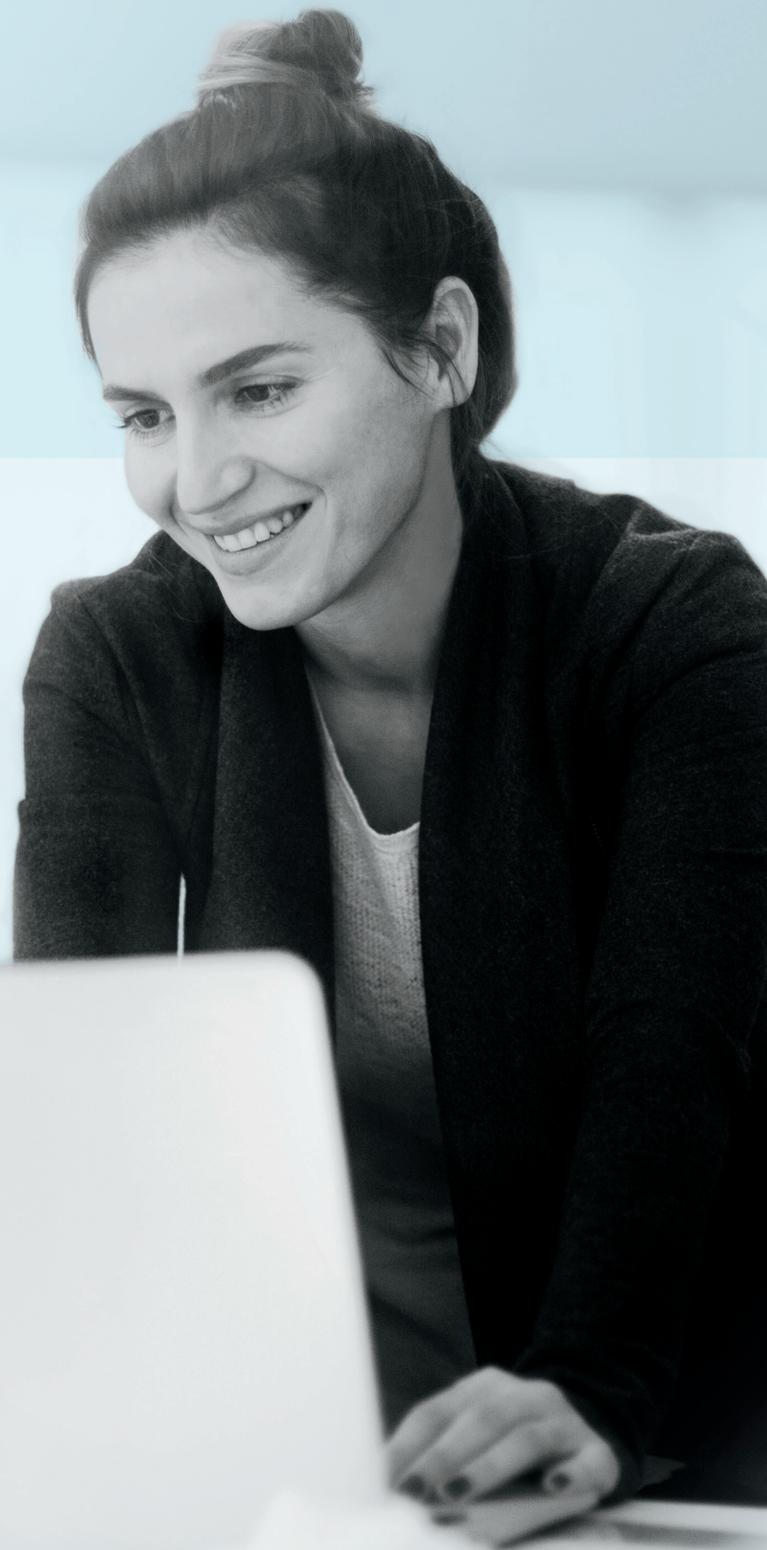
YOUR WEALTHVIEW CLIENT PORTAL STARTER'S GUIDE

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.

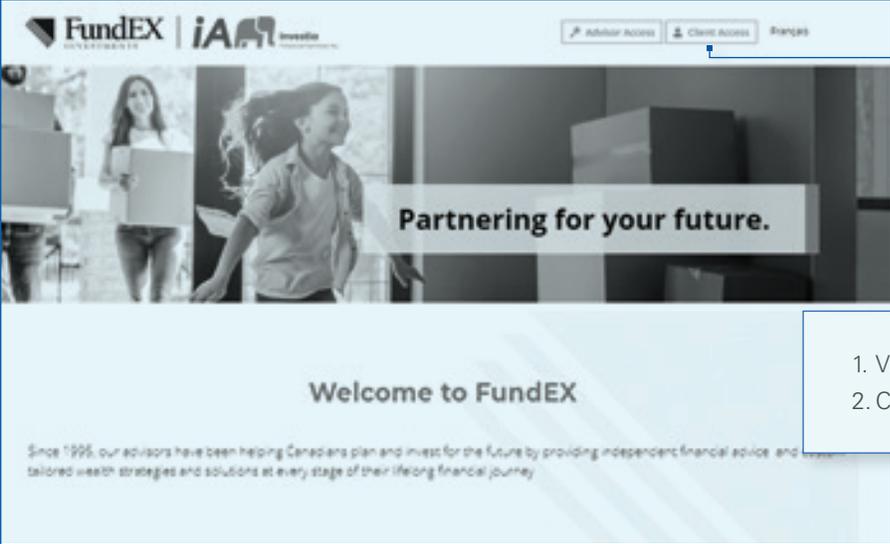
Your Wealthview Client Portal provides:

- 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



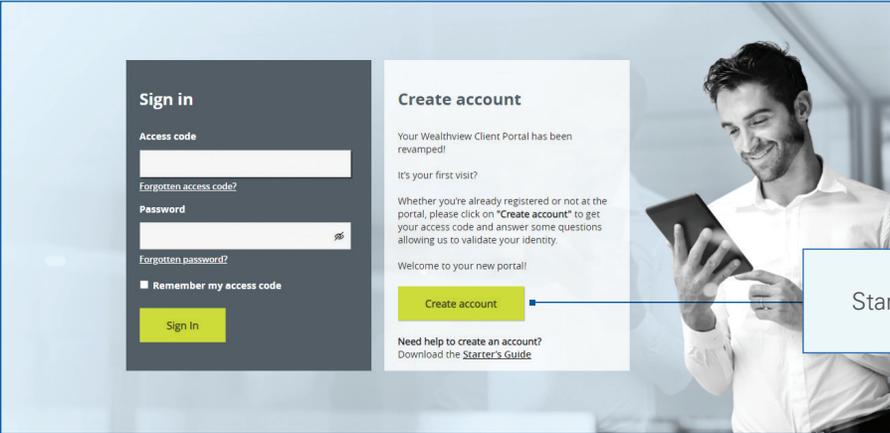
REGISTERING AND SETTING UP YOUR PROFILE

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

Register as a....

Client

First name Last name

Date of birth

Country
 Canada
 International

Postal Code My address does not have a postal code

Fill one of the following information

Activation key [I don't have my key](#)

Client number

Client number

Continue Cancel

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

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.

XXXX-XXXX-XXXX

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

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... [v]

Answer no 1
[]

Question no 2
Choose... [v]

Answer no 2
[]

Question no 3
Choose... [v]

Answer no 3
[]

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

Continue

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.

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.

An email confirming your registration will be sent to the email address provided in this registration process.

Signing in

The screenshot shows two side-by-side panels. The left panel, titled "Sign in", contains an "Access code" field with the text "investorclient@gmail.com", a "Forgotten access code?" link, a "Password" field with a masked password ".....", a "Forgotten password?" link, a "Remember my access code" checkbox, and a yellow "Sign In" button. The right panel, titled "Create account", contains a message: "Your Wealthview Client Portal has been revamped! It's your first visit? Whether you're already registered or not at the portal, please click on 'Create account' to get your access code and answer some questions allowing us to validate your identity." Below this is a yellow "Create account" button, a "Welcome to your new portal!" message, and a link: "Need help to create an account? Download the [Starter's Guide](#)".

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

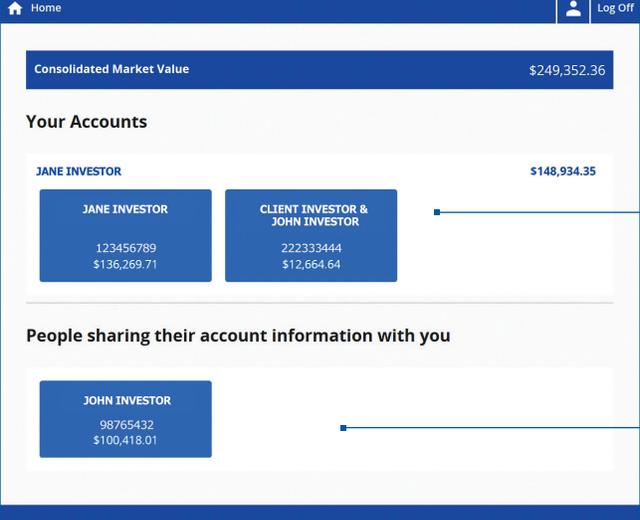
The screenshot shows a "Registration for e-delivery" form. At the top, it says "A flexible and secure solution!" and "Go paperless and sign up to receive your documents online. You will be notified by email when new documents are available for consultation from your Client Portal. Save your preferences for each of your accounts." Below this is a "Personal email" field with the text "investor@email.com" and a close button. Underneath is the "E-delivery of statements" section with a checked checkbox: "I agree to access my documents online in my Client Portal." At the bottom is a blue "Apply" button. There are also a "Home" link and a "Log Off" button in the top right corner.

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

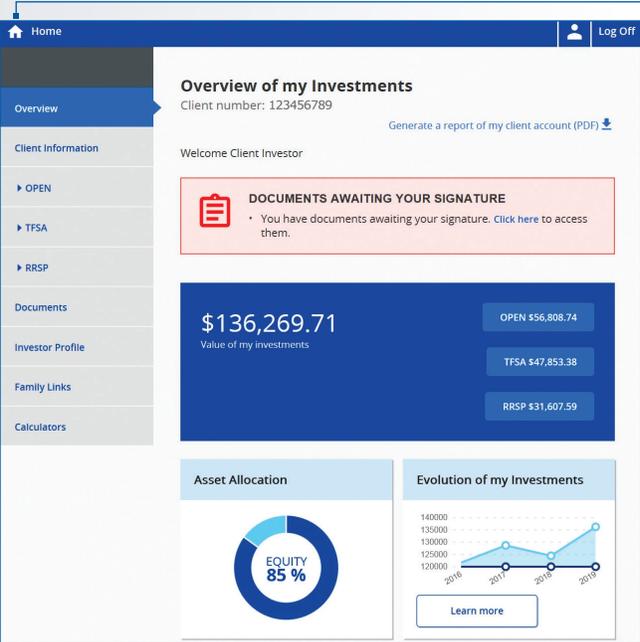
Your home page



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

Overview of my Investments
Client number: 123456789
Generate a report of my client account (PDF) [↓](#)

Welcome John Investor

\$86,931.73
Value of my Investments [Details](#)

Asset Allocation
EQUITY 83%

Evolution of my Investments
100000
80000
60000
40000
20000
0
2016 2017 2018 2019 2020
[Learn more](#)

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

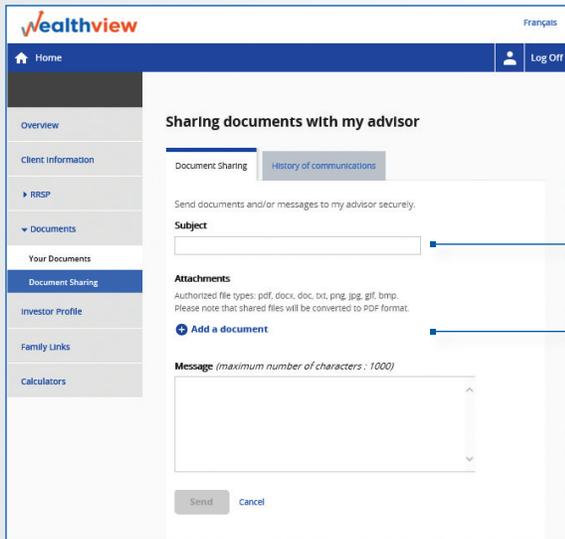
The security of your information is our priority. We encourage you to take advantage of the document/message sharing options.

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

Evolution of my Investments
100000
50000
0
2016 2017 2018 2019 2020
[Learn more](#)

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

You can also upload documents from your smartphone or tablet.



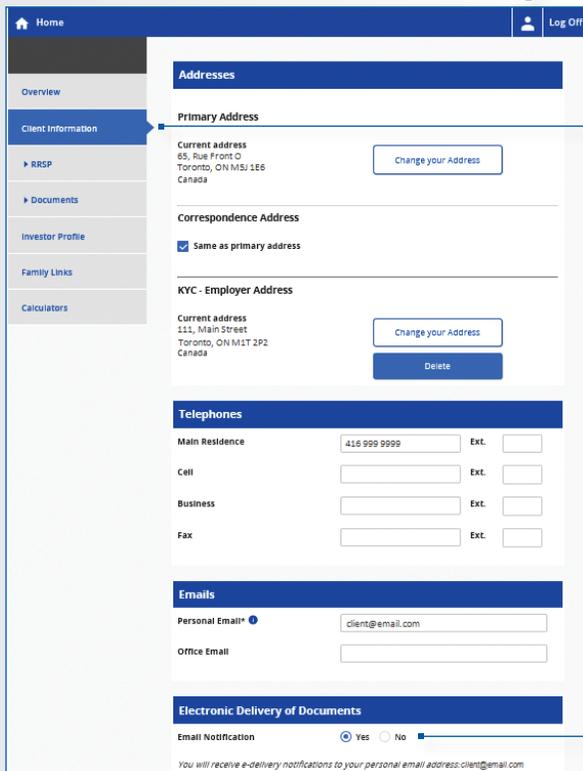
1. Include a **subject**
2. Add as many documents as necessary
3. You can also add a message to your advisor if applicable
4. Click on Send

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

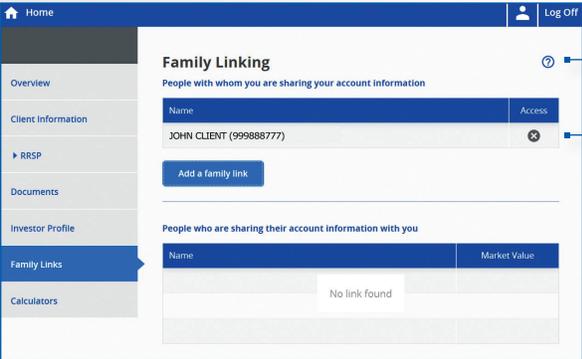


You can change your account information and/or options such as your password, access code, etc. here.

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.

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.

INVESTED IN YOU.

fundex.com

Mutual funds are not guaranteed; their values change frequently and past performance may not be repeated. Investors will pay management fees and expenses, may pay advice fees and may experience a gain or loss. Please read the simplified prospectus or the Fund Facts document before investing. Recommended portfolios are subject to change.

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FundEX Investments is a trade name of Investia Financial Services Inc.