

WebCONNECT - Client User Guide

Introduction

Welcome to WebCONNECT! Investia is pleased to introduce our new secure portal for our clients that will provide online access to your portfolio holdings, investment balances, asset allocations and account activity. This new portal has a much different look and feel from our old Investor website and also provides you with the ability to retrieve and view your quarterly account statements online. New industry rules require mutual fund dealers like Investia to issue mutual fund statements quarterly beginning March 31st, 2012, whereas previously we were only required to issue statements annually. Electronic statements, instead of paper, will contribute to help reduce costs and environmental impact. You will be able to access and retrieve statements anywhere, anytime.

The purpose of this guide is to help you navigate through WebCONNECT. The portal is optimized for use on a variety of different browsers and devices (see reference chart on page 5).

Home Page

To log into Investia WebCONNECT go to <https://client.investia.ca>. On the Home Page you will be able to:

1. Sign into Investia WebCONNECT;
2. Register yourself for access to WebCONNECT (if it has not already been supplied by your advisor);
3. Reset your password;
4. Find a copy of this manual under the “Help” link.

Signing In

Signing in to WebCONNECT requires you to enter two unique fields:

Client ID: This is your unique identifier that has been provided to you by your advisor or during the self-registration process (explained later in this guide).

Password: The secure password chosen by you (or temporarily assigned to you by your advisor).

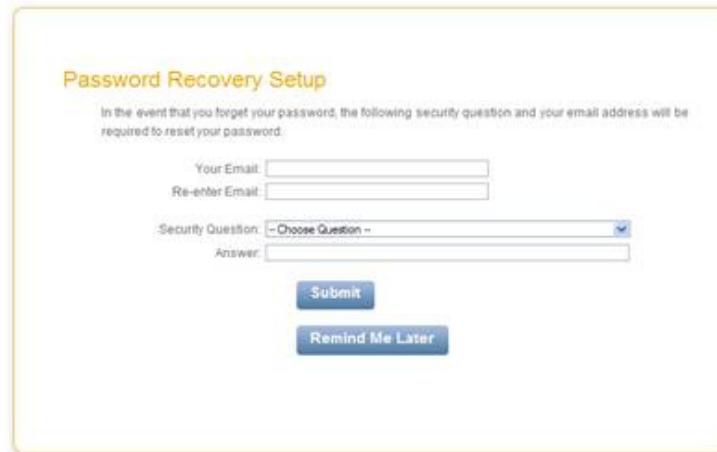
NOTE: If you currently have access to the existing Investia Investor website, you can continue to use that login ID and password for WebCONNECT.

New Password Page

If you are using WebCONNECT for the first time and were provided with a temporary password from your advisor, you will be required to reset your password. Please note that your password can expire due to prolonged inactivity and you may have to reset it.

Password Recovery Setup

Upon successful sign in, you will be prompted to provide additional information that will assist you in resetting your password in the future if you needed to. Completing this page will allow you to use the "Forgot your password" function on the home page. If you do not complete this setup, you will have to contact your advisor to reset your password.

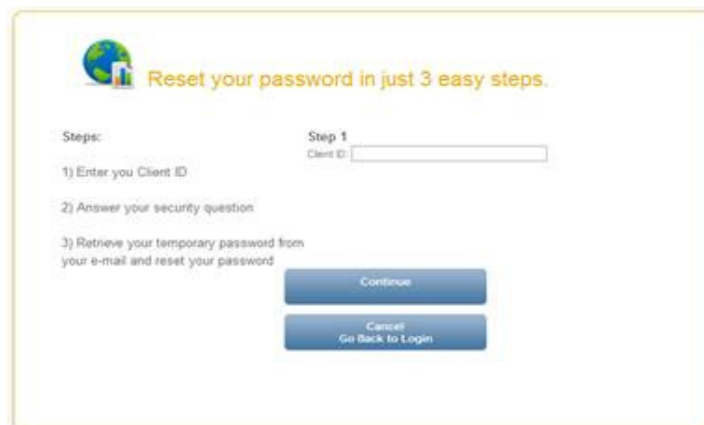


The screenshot shows a web form titled "Password Recovery Setup". Below the title is a short paragraph: "In the event that you forget your password, the following security question and your email address will be required to reset your password." The form contains the following fields and buttons:

- "Your Email:" followed by a text input field.
- "Re-enter Email:" followed by a text input field.
- "Security Question:" followed by a dropdown menu with the text "-- Choose Question --".
- "Answer:" followed by a text input field.
- A blue "Submit" button.
- A blue "Remind Me Later" button.

Password Reset

The password reset process is started by clicking on "Forgot your password" on the home page.



The screenshot shows a web page titled "Reset your password in just 3 easy steps." with a globe icon. The page lists the following steps:

- 1) Enter your Client ID
- 2) Answer your security question
- 3) Retrieve your temporary password from your e-mail and reset your password

Below the steps, there is a "Step 1" section with a "Client ID" label and a text input field. At the bottom of the page, there are two blue buttons: "Continue" and "Cancel Go Back to Login".

You will then be asked to enter your Client ID and the answer to the security question entered in the password recovery setup. Once complete, you will receive an email with a temporary password which will need to be reset. If you have not completed the password recovery setup, you will need to contact your advisor's office to reset your password to WebCONNECT.

WebCONNECT Self-Registration

You can register to WebCONNECT by using the self-registration setup. To begin, click on the "Register" button on the home page.

The screenshot shows a web registration form with the following elements:

- Header:** "Register to access your account online in just 2 easy steps!" with a globe icon.
- Registration Requirements:**
 - Invitation Code
 - Fund Company Account Number
- Step 1:**
 - Invitation Code:** A text input field with a link: "Click here to get your invitation code".
 - Account Identification:**
 - Fund Company Account Number:** A text input field with a link: "Where can I find my account number?".
 - Last 3 Digits of SIN:** A text input field.
 - Date of Birth:** Two dropdown menus for month (January) and year (2012).
- Buttons:** "Cancel Registration" and "Continue to Step 2".

If you do not wish to use self-registration, you can contact your advisor's office to get set up.

NOTES:

- For corporate ownerships, you cannot use self-registration because it requires the last three digits of a social insurance number. You must contact your advisor's office to get set up for corporate ownerships.
- If you hold a joint account, 2 options are available. You may either contact your advisor who will proceed with your registration and provide you with a temporary password, or register yourself by using the self-registration setup. You will then be required to enter the primary account owner's information (last 3 digits of the SIN and birth date). The primary account owner is the person whose name appears first on your account statement.
- If you hold funds with several fund companies, any account number may be entered under "Fund Company Account Number".

E-Delivery Enrolment Setup

Upon logging into WebCONNECT, you will be presented with a campaign page for e-delivery enrolment. Follow the screen options to proceed with enrolment and use campaign code INV2012



NOTE: You can change your delivery preferences at any time once inside WebCONNECT under My Profile→Preferences (explained later in this guide).

WebCONNECT Navigation

Once logged into WebCONNECT, navigating the site is easy.

ACCOUNT	MARKET VALUE
Open or Non-Registered - 1234	\$12.75
RDCSP	\$4.06
Open or Non-Registered	\$0.00
Open or Non-Registered	\$0.00
RDCSP - 188123333	\$2.50
RDCSP	\$1.00
Open or Non-Registered	\$6.75
RDCSP	\$1.81
Open or Non-Registered	\$0.00
Open or Non-Registered	\$0.00
RDCSP	\$0.30
Open or Non-Registered - 1234	\$0.00
RDCSP	\$0.00
Open or Non-Registered	\$0.00
Open or Non-Registered	\$0.00
Total:	\$22.87

Click on “Help” in the top right corner for assistance with finding answers to some common questions.

The **My Profile** section contains your contact information on file with Investia Financial Services Inc. It is also where your **Preferences** are kept for things like E-Delivery enrolment, Password Recovery and changing your password.

The **My Alerts** tab will display any new notifications (for instance, when a document is posted or when email validation is required).

The screenshot shows the 'My Profile' section of a web application. The 'PREFERENCES' tab is active. The page is divided into three main sections: 'E-Delivery Enrolment', 'Security Question', and 'Change Password'. The 'E-Delivery Enrolment' section includes a checkbox for receiving documents via email and input fields for email address. The 'Security Question' section includes input fields for email and a dropdown for a security question. The 'Change Password' section includes input fields for current, new, and re-enter password, along with password rules. The footer contains legal information and the Investia logo.

The **Documents** section will contain any statements that have been generated for you to view.

Browser Compatibility

WebCONNECT is supported on the following browsers and devices:

DEVICE CATEGORY	PLATFORM	BROWSER	VERSION
Desktop/Notebook	Windows	CHROME	8 and higher
Desktop/Notebook	Windows	FIREFOX	3.5 and higher
Desktop/Notebook	Windows	INTERNET EXPLORER	7 and higher
Desktop/Notebook	Windows	SAFARI	5 and higher
Desktop/Notebook	OS X	CHROME	8 and higher
Desktop/Notebook	OS X	FIREFOX	3.5 and higher
Desktop/Notebook	OS X	SAFARI	5 and higher
Tablet			iOS version 3.2 and higher

We hope that you find WebCONNECT useful and we plan on expanding its functionality over the coming months. If you have any questions around how to register for or how to use WebCONNECT, we ask that you please contact your advisor.