

## Client Self-Registration Guide



### ***Welcome to Your Client Portal***

Quick, easy, user-friendly view of your complete financial information.

## How to Access FundEX Wealthview

From the FundEX public website (www.fundex.com), clicking “Client Access” or enter https://client.fundex.com in your browser.

The image shows a screenshot of the FundEX website. At the top left is the FundEX logo. To the right of the logo is a navigation menu with links for "Advisor Access", "Client Access", "Français", and social media icons for Twitter, Facebook, and LinkedIn. Below the logo is another navigation menu with links for "Home", "About Us", "Investors", "Advisors", and "Contact Us". A callout box with an arrow points to the "Client Access" link in the top navigation menu, containing the text "Click here to access Wealthview". Below this is a large banner image of elephants with a semi-transparent text box that reads "A subsidiary of iA Financial Group" and "Strength you can count on for over 100 years. INVESTED IN YOU." Below the banner is another callout box with an arrow pointing to the "Client Access" link in the bottom navigation menu, containing the text "or click here". Below the banner is a "Welcome to FundEX Investments Inc." section with two columns of text. The left column starts with "Since 1995, FundEX Investments Inc. has been providing" and the right column starts with "Coupled with the strength of our parent company, Industrial".

## FundEX Wealthview Self-registration

Clients cannot use the self-registration process for corporate accounts because a SIN is a required field. For corporate account holders, simply ask your Representative for a temporary password.

For joint accounts, the SIN and Date of Birth specified below must belong to the primary owner.

1. Prior to starting the self-registration process, you will need the following information to begin the process:
  - a. Your FundEX client number: This number is found on your FundEX statement. It may also be provided by your advisor.
  - b. SIN (last 3 digits): the last three digits of your social insurance number.
  - c. Date of Birth

2. With all of the information available, click “Registration” and complete Step 1 and click Step 2.

## LOGIN

The screenshot shows a login form with the following fields: "User name or client number", "Password", and "Connection type" (with "Client" selected). A "Log in" button is present. Below the form is a link: "Forgot your login information?". To the right, a dark box contains the text: "NEW REGISTRATION? To access your data, you need to register a user account. The process is short and easy." Below this text is a "Registration" button. A white box with the text "Click here" and an arrow points to the "Registration" button.

## Register: Step 1

The registration form is titled "Client information" and includes the instruction: "First, we have to make sure that you are a FundEX client." The form contains the following fields and controls:

- FundEX client number**: A text input field with a circled "1" next to it. Below the field is the text: "This number is found on your FundEX statement. It may also be provided by your advisor."
- SIN (last 3 digits)**: A text input field with a circled "2" next to it. Below the field is the text: "This is the last three digits of your social insurance number."
- Birthdate**: A date selection interface with a circled "3" next to it. It includes dropdown menus for "Month", "Day", and "Year" (currently showing "1950"), and a calendar icon.
- At the bottom, there are two buttons: "Cancel" and "Step 2" (with a circled "4" next to it).

3. On the first login, you will be asked to choose a username, password, and select 3 security questions for future password recovery requests.

Register: Step 2

**User account information**  
Lastly, you must provide login information and choose three secret security questions.

**Choose a user name**  
[Text input field]

For future visits, you can use your new user name or your client ID number.

**Choose a password**  
[Text input field]

Combination of eight varying case letters and numbers.

**Confirm password**  
[Text input field]

**Account email**  
[Text input field]

**E-delivery of statements**  
 I want to receive my statements electronically

**First secret question**  
What was the name of my first dog? [Dropdown menu]

In case you forget your account user name or password, you will be able to answer two out of those three secret questions to initiate a recovery process.

**First secret answer**  
[Text input field]

Secret answers are case insensitive and are encrypted before storage.

**Second secret question**  
What is my mother's maiden name? [Dropdown menu]

**Second secret answer**  
[Text input field]

**Third secret question**  
What is my favorite dish? [Dropdown menu]

**Third secret answer**  
[Text input field]

**Conditions of use**

**Terms of Access**  
Access to and use of the client portal ("the portal") for FundEX Financial Services Inc. ("FundEX") constitute your acceptance of and compliance with the Conditions of Use set out herein. Please take the time to review these conditions. If you do not accept them, please discontinue use of the portal.

**Intended Use**  
The portal provides you with secure online access to your account balances, your investment holdings, your transactions and your dealer account statements. FundEX does not warrant that

I accept the terms and conditions  
You must read the terms and conditions until the end before you can accept them.

Cancel Register

**User name:** You will have the choice to use your user name or your client number on subsequent visits.

**Password and confirmation:** This *new* password must include at least 8 digits and at least one number, one upper case letter and one lower case letter.

**Account email:** The email address provided will be used for password recovery requests and email notifications for the electronic delivery of documents sent by FundEX, if applicable.

**E-delivery of statements:** The registration box is selected by default. If you prefer to receive statements by mail, please uncheck this box. You may also revoke the e-delivery preference at any time using the *Options - Settings* menu.

**Secret questions:** Please select and answer three questions to be used for future password recovery requests.

**Conditions of use:** You must acknowledge acceptance of the conditions by selecting the "I accept the terms and conditions" box.

**Click Register** to complete the registration process and you will be automatically redirected to the home page of Wealthview.

Please keep your username and password in a secure place for future use.

Want to learn more about your client portal? Click the link below for an overview video.

[Client Portal Video](#)

## Client ID, Username or Password Recovery

### Subsequent visits – Password recovery process

If you have previously successfully completed "Register: Step 2" (shown above) but have forgotten your password, click the "Forgot your login information?" link and enter your username or client number to initiate the password recovery process and follow the steps. A temporary password will be emailed to your email address on file.

### Forgotten login information

**Recovery procedure**  
Once your identity has been validated, this page will allow you to login and set a new password.

User name or client number

1

Cancel

### Forgotten login information

**Recovery procedure**  
You must correctly answer two of the three questions.

What is my mother's maiden name?

What is the color of my eyes?

What is the color of my hair?

2

You must answer 2 of the 3 questions.  
The questions displayed are based on your selection during your "Registraton"

Cancel  3