January 27, 2021

Client Portal: Frequently Asked Questions

We want to dedicate this communication to address the most asked questions from advisors, assistants, and clients

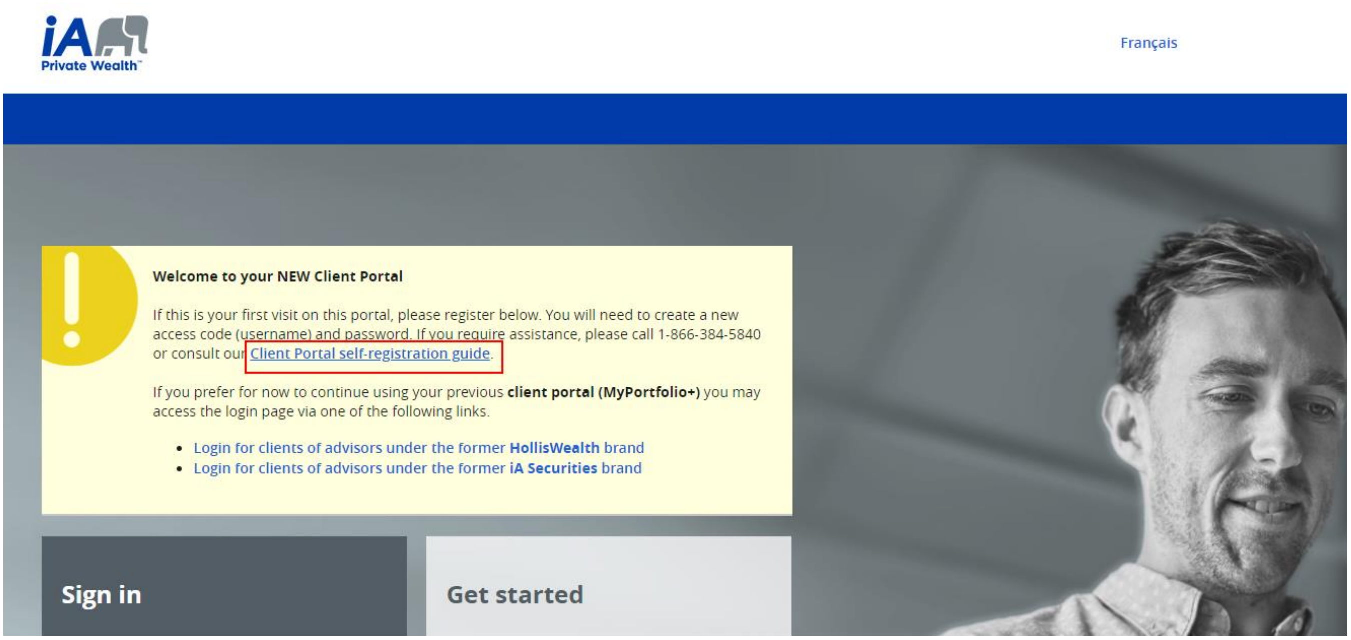
Overview

We are pleased to share that over 4,000 clients have registered on the new client portal since the official launch date of January 18, 2021. That brings the total number of client portal users to over 5,000. Thank you for your support! Please take time to read the following FAQs and let us know if you have further questions.

Frequently Asked Questions

Q: Is there a guide that I can give to my clients on how to register?

A: Yes. The client portal self-registration guide is available for clients to download from the login page:

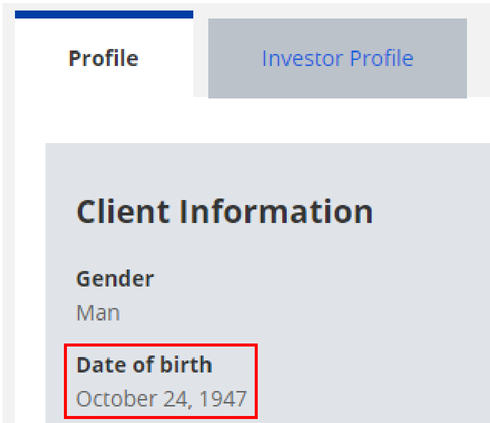


This guide, along with other supporting material is also available on [WealthLink > Practice Management > Advisor Technologies > Client Portal].

Q: My client tried to register but got an error, why?

A: Please ensure your client puts information exactly as what is shown on statement:

- Name and postal code must match with what statement shows.
- In some cases, the client's date of birth may have been incorrectly inverted (month and day). You can use Advisor Centre to check what we have in the system. If there is any discrepancy, please email New Accounts department to correct it.



- If you cannot find this client in Advisor Centre, or if your client still cannot register after putting correct information, please contact Client Support at client.support@iawealth.com

Q: Can a client with only corporate accounts access the client portal?
A: We are developing the feature to allow clients with only corporate accounts to access the client portal in Q1 2021.

Q: For a client with personal and corporate accounts, how can he link the corporate account to his client portal access?
A. If the client is registered with a personal account and is the owner of a corporate account, a request can be sent to Client Support to link the corporate account to the client's access. Alternatively, the client can contact the Client Support directly at 1-866-384-5840 to link the corporate account.

Q: My client owns multiple accounts; how can she see all accounts under one access?
A. The Client Portal uses a logic to automatically merge multiple Client IDs into one online access, so the client just need to register once and should be able to see all of their personal accounts. However, due to information inconsistency (for example one Client ID has middle name, the other doesn't) entered in our book of record, the system may not be able to merge them. If that happens, please contact Client Support so we can get it fixed.

For clients who has personal and corporate accounts, the system won't merge them, and you need to contact Client Support to link the corporate account to the client's access.

Q: I found more than one profile of my client in the search result, is this normal?
A: The Client Portal uses rules to merge client IDs of the client into one profile. If your client appears multiple times in the search result, or could not find a client, please email Client Support at client.support@iawealth.com.

Q: My client got a "global error" when logging from a mobile device?
A: We are aware that some clients have encountered this error message. We are actively investigating the issue. In the meantime, we recommend client clear browser cookies and cache, or try a different browser.

Q: My client wants to share her accounts with another client, how can she do that?
A: There are two ways to do it. Either the client does it herself, or head office can help set it up. Please refer to this Access Share Reference Guide for detail.

Q: My client cannot login to the iA Mobile app on his phone, why?
A. Mobile app is something on our roadmap to work on this year, but it is not available yet. The iA Mobile app that clients can download from app store is for the insurance clients only of iA Financial Group.

Q: I want to change the performance start date to since account inception. How?
A: By default, the performance data shown is since January 1, 2016. If you want to show performance data since account inception (meaning since as far as we have data in Croesus), please email the list of the affected rep codes to derek.li@iawealth.com. You can refer to the Performance Reference Guide for more information.

Q: The market value shown on Client Portal is different from MyPortfolio+, why?
A. There are three reasons why the market value may be different:

1. MyPortfolio+ updates the market value of equity (stock, ETF, option) intraday, whereas Client Portal always displays the closing price from previous business day. We are targeting to add intraday update option by end of Q2 this year.
2. For foreign exchange rate, MyPortfolio+ uses 4 decimal points and gets the data from a different vendor. Client Portal uses 6 decimal points and is getting the data from the same vendor as client statement and Croesus.
3. Accrued interest. Client Portal currently does not include accrued interest for fixed income securities with compound interest. We are developing this function right now.

For more information
If you have any questions, please contact Advisor Services.