Personalized Tax Checklist in the Client Portal/Mobile App

With tax season quickly approaching, we wanted to let you know about our feature that iA Private Wealth introduced last year to make your tax preparation easier this year.

In mid-March, iA Private Wealth's Client Portal and Mobile App will make a personalized tax document checklist available to clients. The checklist will provide a summary of the tax slips and documents you can expect to receive for your registered and non-registered accounts at iA Private Wealth, as well as any mutual fund documents sent to you directly from the fund companies.

Accessing your personalized tax document checklist is simple:

- ·Log in to the Client Portal or Mobile App
- ·On the Overview page, look for the "New Tax Document Checklist" popup message
- ·Click the "View your documents" button to see your checklist
- ·You can also find the checklist anytime under the "Tax Documents" filter on the Documents page

If you're not currently registered for the Client Portal or Mobile App, we encourage you to sign up. In addition to the new tax checklist feature, these digital platforms provide a host of benefits:

- ·Consolidated at-a-glance view of your financial information
- ·State-of-the-art encryption technology to keep your data safe
- ·Secure storage of and access to your statements, tax documents and more
- ·A protected portal for safely sharing documents with me and my team

Here's how to register for the Client Portal:
Simply refer to the attached step-by-step Client Portal Self-Registration Guide. Before starting, make sure you have the following information ready:

- ·Your Client ID (located on your monthly statement)
- ·The email address you want to use for the account
- ·Your desired username (8-15 characters; upper/lower case and special characters)
- ·Your password (8-15 characters; upper/lower case and special characters; different from your username)

After registering, you can set up the multi-factor authentication (MFA) method of your choice for an added layer of security each time you log in.

We're certain you'll find the new personalized tax document checklist to be a helpful resource this tax season. As always, don't hesitate to reach out with any questions.

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