

Box® – Secure Exchange Functionality

National Bank Financial Wealth Management now offers a simple, fast and secure solution to share your confidential documents with your Advisor and their team.

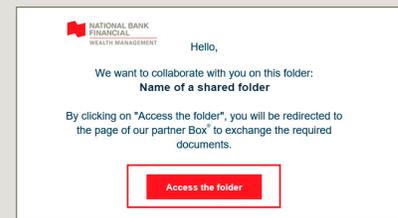
How to create your Box account



1 Open the invitation email you received from NBF

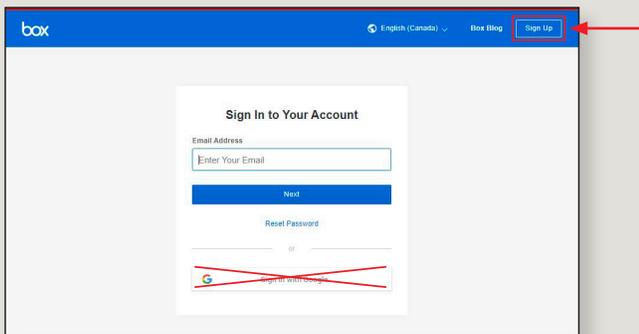
Careful! This email may end up in your “spam” folder. Please make sure to look in it.

- › Click on **“Access the folder”** in the email
- › If you haven’t received an invitation email, go to box.com and follow the instructions starting at step 3.



2 This page will open in your Internet browser

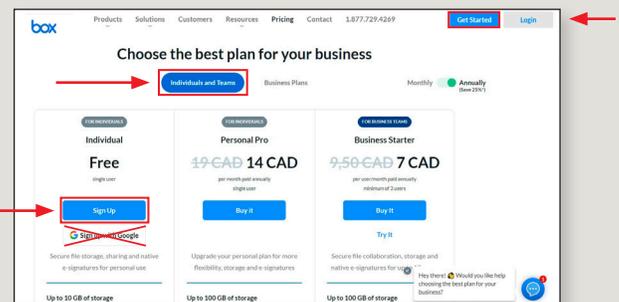
- › If you don’t have an account, click on **“Sign Up”** in the upper right



The Box application can also be downloaded on your usual platforms.

3 Choose the free Individual program

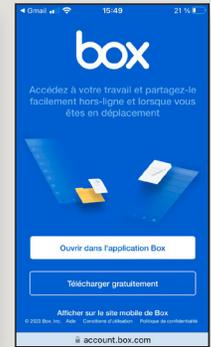
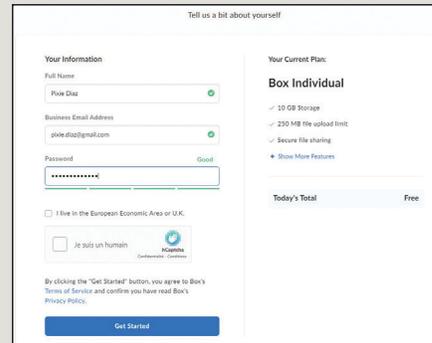
- › Click on **“Get started”**
- › Click on **“Individuals and Teams”**
- › Choose the free Individual program and click on **“Sign up”**



Note: To change to French, click the button at the bottom right of the page.

4 Follow the registration steps

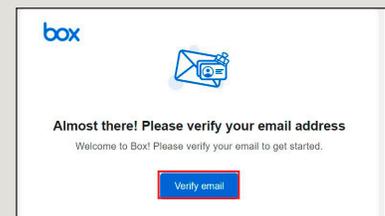
- › Fill in all the fields
- › **Warning!** Your password must be strong; it must include a combination of at least 8 uppercase letters, lowercase letters and special characters, as well as 2 or more numbers. It cannot include a space or the < and > symbols.
- › Click on **"Get started"**



5 You will receive a confirmation email at the address you entered when creating your account

Careful! This email may end up in your "spam" folder. Please make sure to look in it.

- › Click on **"Verify email"**

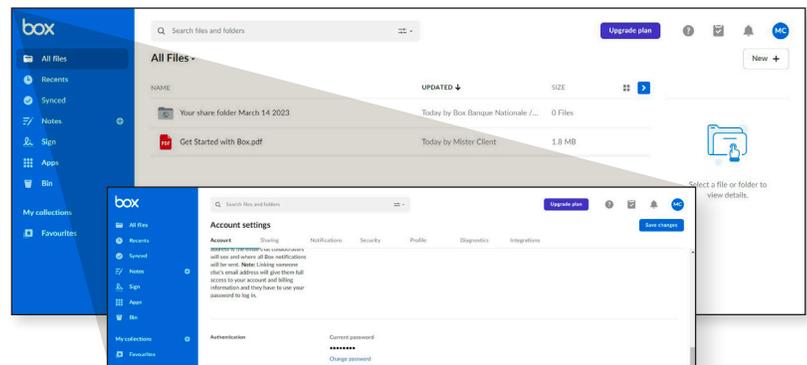


Congratulations! Your Box account is now set up!

Here is what your Box account should look like.

- › The documents that will be shared between you and your Advisor or a member of their team will be in the folder created for you.
- › Open the folder to add or retrieve a document.

Note: If you place a document outside the folder, your Advisor won't be able to see it.

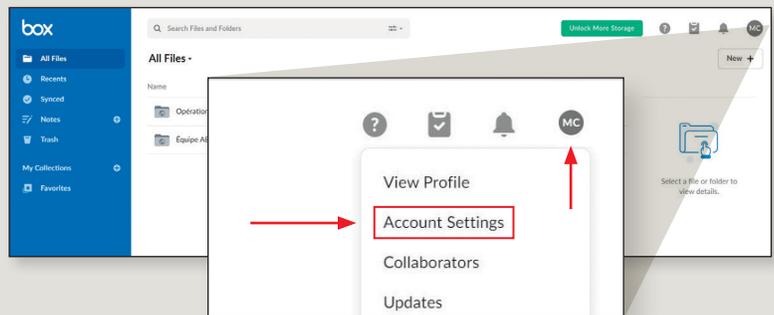


In order to know that your Advisor or a member of their team wants to share a document with you, we suggest that you turn on the notifications in your Box account.



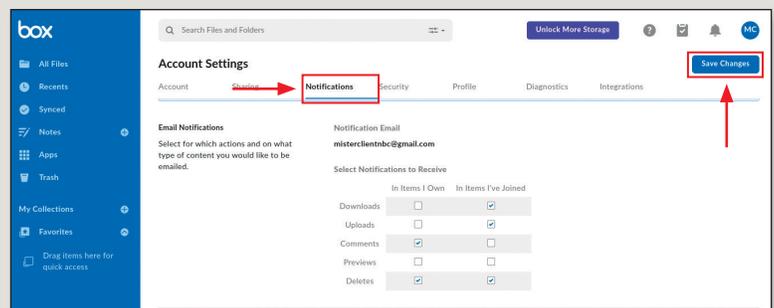
Here's how to do it

1 Click on your initials (top-right corner) and then "Account settings"



2 Click on "Notifications"

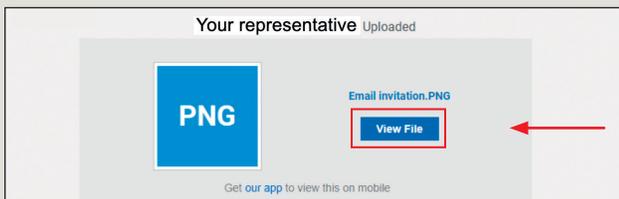
- › Check all the boxes that interest you
- › Click "Save changes"



How to access documents shared by your Advisor or their team

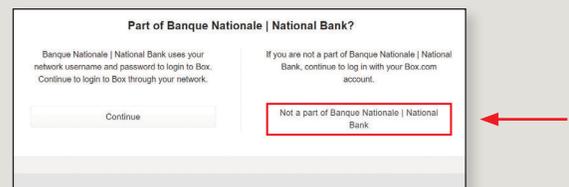


1 Sign in to your Box account at box.com OR click on the link from the notification email you received



2 When clicking on the link, you might see this page

- › Just click on the "Not a part of Banque Nationale | National Bank?" link



3 Sign in to Box on box.com

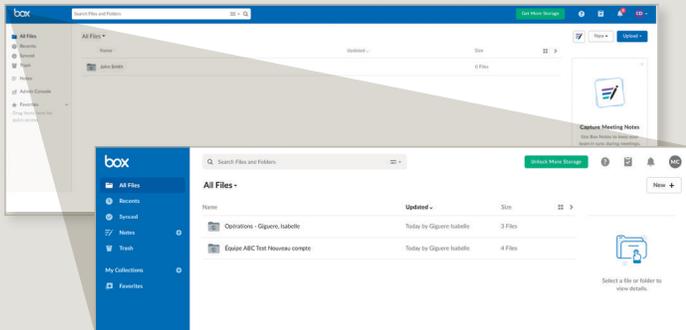
- › Enter your email address
- › Enter your password
- › Click on the shared folder
- › You will see the document your Advisor or a member of their team shared with you

How to share a document with your Advisor or their team



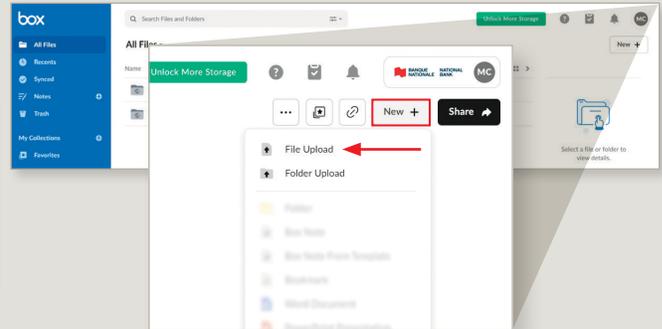
1 Sign in to Box at box.com

2 Click on the shared folder



3 Add a document

- Click on **"New +"**, then on **"File upload"**; click on the file you wish to share
- Once uploaded, the file will appear in the folder and your Advisor or a member of their team will be able to access it



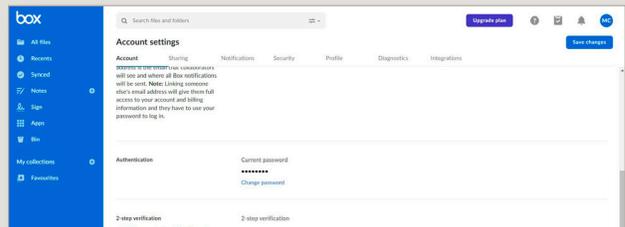
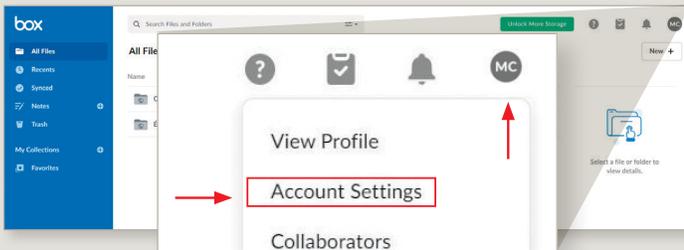
Two-factor authentication



You can strengthen your security by choosing a login process through multifactor authentication using a validation code sent by text or email.

1 Click on your initials (in the top-right corner) and then on **"Account settings"**

2 In the **Account** tab, go to the **"Two-step authentication"** section



3 Click on **"Configure"** and select your preferred verification method

4 Enter the confirmation code you receive

Set up 2-step verification

Select a sign in option:

Authenticator app **RECOMMENDED**
You will receive a code from an authenticator app to sign in. [View suggested authenticator apps](#)

SMS text message
You will receive an SMS text message on your phone with a code to sign in.

Email
You will receive an email with a code to sign in.

Cancel Next

Configuration de la vérification en deux étapes

Un code de confirmation a été envoyé par SMS au numéro de téléphone que vous avez indiqué. Veuillez saisir le code ci-dessous.

Pays
Canada (+1)

Numéro de portable
[Redacted]

Code de confirmation
[515372]

Annuler Continuer

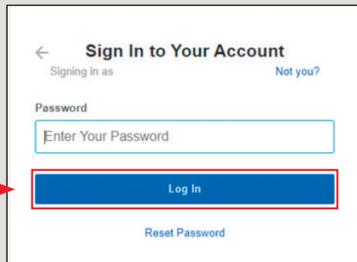
How to reset your password if forgotten



Have you forgotten your Box password? Don't worry, simply follow these steps!

1 Go to box.com or click on the link you received by email from your Advisor or a member of their team

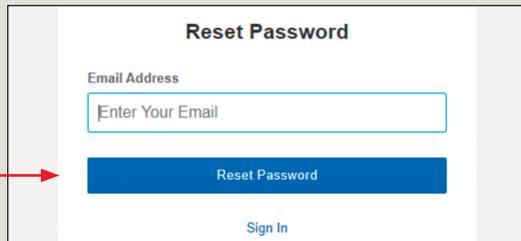
2 Click on **"Reset password"**



A screenshot of the 'Sign In to Your Account' page. It features a 'Password' field with the placeholder text 'Enter Your Password'. Below the field is a blue 'Log In' button, which is highlighted with a red box and a red arrow pointing to it from the left. Below the 'Log In' button is a 'Reset Password' link.

3 Enter the email address you used to set up your Box account

› Click on **"Reset password"**

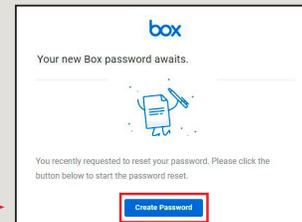


A screenshot of the 'Reset Password' page. It features an 'Email Address' field with the placeholder text 'Enter Your Email'. Below the field is a blue 'Reset Password' button, which is highlighted with a red box and a red arrow pointing to it from the left. Below the 'Reset Password' button is a 'Sign In' link.

4 You will receive an email with the subject line **"Your new password is available"**

- › In this email, click on **"Create a new password"**
- › On the box website, choose your new password and confirm

Warning! Your password must be strong; it must include a combination of at least 8 uppercase letters, lowercase letters and special characters, as well as 2 or more numbers. It cannot include a space or the < and > symbols.



A screenshot of an email notification from Box. The subject line is 'Your new Box password awaits.' Below the subject line is a blue 'Create Password' button, which is highlighted with a red box and a red arrow pointing to it from the left.

5 You can now sign into your account with the new password

- › Enter your email address
- › Enter your new password

Note: If you have trouble resetting your password, you can submit a request by clicking here: support.box.com.

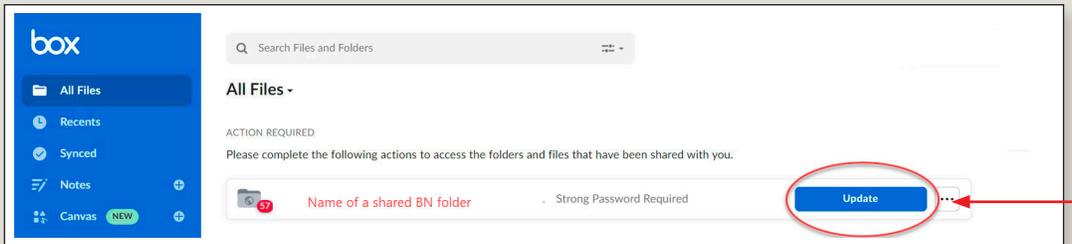
How to reset your password if it is not strong enough



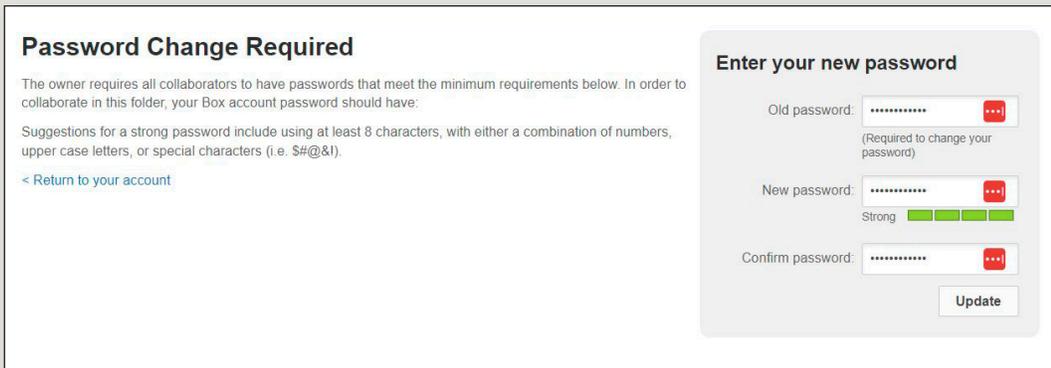
If your password is not strong enough, you may not have access to your documents for security reasons.

Don't worry, here's how you can reset it.

1 If you see the message "Strong Password Required", click on "Update"



2 Choose a new strong password that includes a combination of at least 8 uppercase letters, lowercase letters and special characters, as well as 2 or more numbers. It cannot include a space or the < and > symbols



Safety above all

No transaction or request will be initiated through Box or email. To initiate a transaction or request, contact your Advisor and their team by phone or in person.

Documents sent through the Box shared folder will be deleted as soon as they are no longer in use or after 30 calendar days.

Your data in these documents will be used in accordance with our [Privacy policy](#).