

How to use Box® step by step

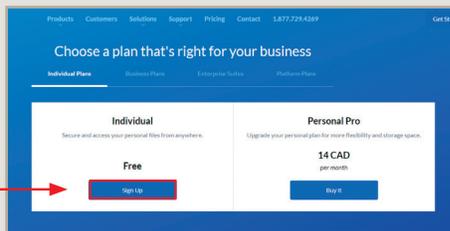
National Bank Financial Wealth Management offers a simple, fast and secure solution to share your confidential documents with your Advisor and their team.

How to create your Box account



1 Go to box.com

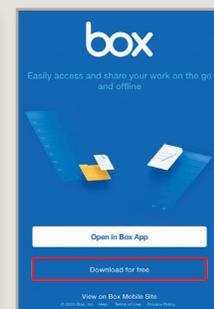
- > Select **"Pricing"** and then **"Individual plans"**
- > Click on the **"Sign Up"** button for the free individual plan



2 This page will open in your Internet browser

- > Fill in all the fields
- > Check the box **"I'm not a robot"** and then answer the questions if applicable
- > Click **"Submit"**

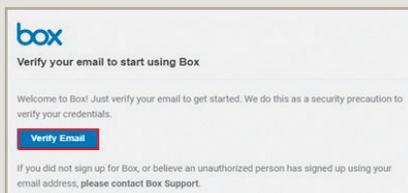
Are you using a mobile device? We recommend that you choose the option **"View on Box Mobile Site"** rather than download the mobile app.



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

Careful! This email could have ended up in your "spam" folder, so remember to check there.

- > Click on **"Verify email"** in the email



4 Once you have confirmed your email, please inform your Advisor, who will then set up a personalized folder for you. After, you will receive an email from noreply@box.com asking you to work on a shared Box folder

Careful! This email could have ended up in your "spam" folder, so remember to check there.

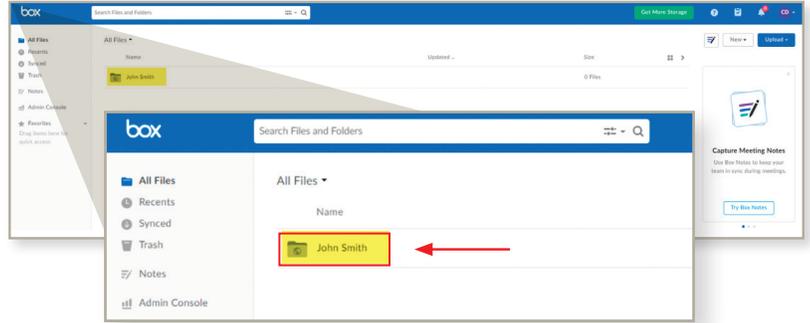
- > Click on **"Go to folder"** in the email



Congratulations! Your Box account is now set up!

Here is what your Box account should look like (your name will appear as the folder name).

- > The documents that will be shared between you and your Advisor will be in the folder created with your name
- > You must click on it to view the documents

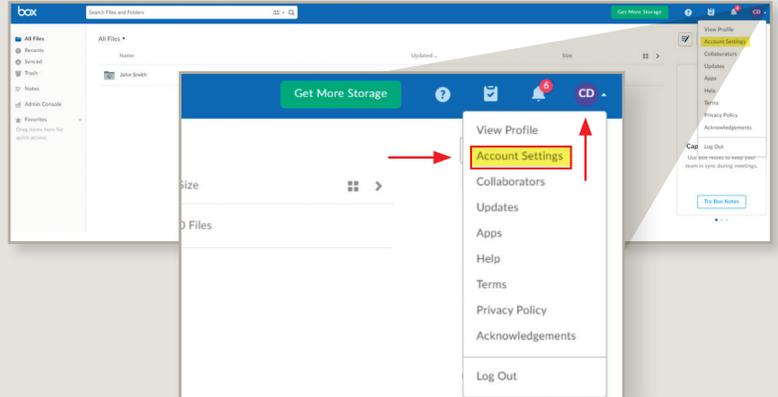


In order to know that your Advisor or a member of their team wants to share a document with you, we suggest that you turn on the notifications in your Box account.

Here's how to do it

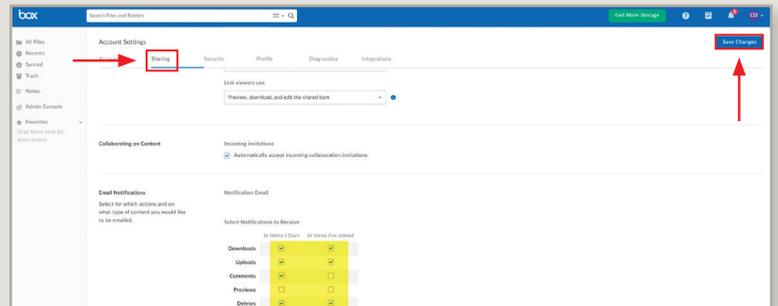


- 1 Click on your initials (top-right corner) and then **"Account settings"**



- 2 Click on **"Sharing"**, then scroll down until you see the **"Email notification"** section

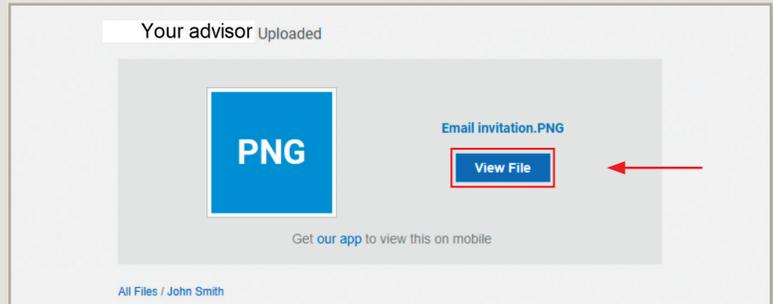
- > Check all the boxes
- > Click **"Save changes"**



How to access documents shared by your Advisor or their team

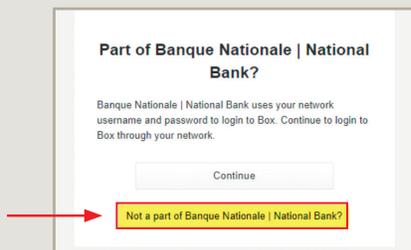


- 1 Sign in to your Box account at box.com OR click on the link from the notification email you received



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

- > Just click on the "Not a part of Banque Nationale?" link



- 3 Sign in to Box on box.com

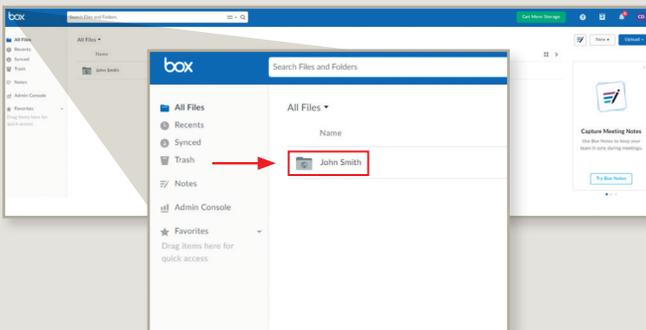
- > Enter your email address
- > Enter your password
- > You will see the document your Advisor or their team shared with you

How to share a document with your Advisor or their team



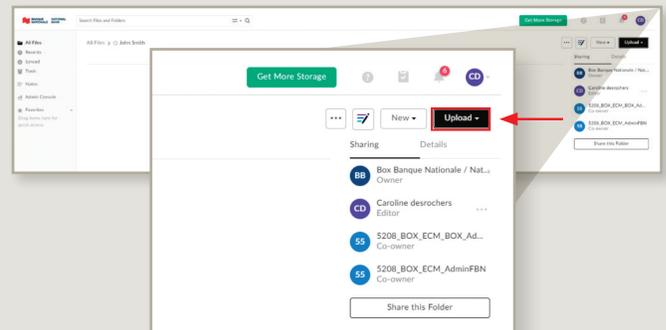
- 1 Sign in to Box at box.com

- 2 Click on your folder (your name)



- 3 Click on "Upload"

- > Browse for the file you wish to share, then click "Open"
- > Once uploaded, the file will appear in the folder and your Advisor or their team will be able to access it



How to reset your password



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 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' and a blue 'Log In' button. A red arrow points to the 'Log In' button. Below the 'Log In' button is a link for 'Reset Password'.

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

4 You will receive an email. Click on **"Reset password"** in the email

A screenshot of the 'Reset Password' form. It has an 'Email Address' field with the placeholder text 'Enter Your Email' and a blue 'Reset Password' button. A red arrow points to the 'Reset Password' button. Below the button is a link for 'Sign In'.A screenshot of an email notification from 'box'. The subject is 'Your new Box password awaits'. The body text says: 'You recently requested to reset your password. Please click the button below to start the password reset process.' There is a blue 'Reset Password' button. A red arrow points to the button. Below the button, it says: 'If you did not request a password change, you may ignore this message and your password will remain unchanged.'

5 A new internet window will pop up and you will be asked to set up a new password

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

- > Enter your email address
- > Enter your new password

More details

No transaction or request will be initiated through Box or email. To initiate a transaction or request, contact your Advisor 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.