Digital Services: Message Centre



Experience simplified communication and enhanced security with our Message Centre!

Effortlessly connect with your wealth management advisor's team and securely share your documents directly from your digital services platform.

Why choose our Message Centre?



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How to access your Message Centre

- 1 Go to <u>nbwfm.ca</u> or click on the *Digital services* link in your notification email. Then log in via *Client access* as usual.
- 2 Once logged in, click on the envelope icon at the top right corner.

NATIONAL BANK FINANCIAL WEALTH MANAGEMENT	©? C Logout
Accounts J Markets J Activities Documents Research J	Get a quote Q Toolbox ~

3 The *Inbox* tab will open. Click on the message to view it. **Note:** When there is an attachment, you will see a paper clip icon.

Message Ce	entre 🖓 Mar 2	20, 2025, 3:39:41 PM		
				New message
Inbox	Sent	Archives		
Date	Subject		From	
15:36	Your ta	ax package for 2024 🥔	National Bank Financial	Ē

- 4 In the message window:
 - a. You can read the message from your wealth advisor's team.
 - **b.** If there are multiple attachments, you can click on *Download all* to save all the documents on your device.
 - c. You can either *Close* the message, *Delete*, or *Reply*.
 - Note: All deleted messages will remain available in the Archives tab in Message Centre for 7 years.

Your tax package	for 2024		×
Jane Smith			Mar 20, 202 1AAAA
Excel_Test_doc.xisx 8.3 KB	Fiscal guide - Fed.pdf 2.7 MB	Fiscal guide - Qc (1).pdf 3.0 MB	+1 more
Download all b			
Hello, This is the tax package for	2024		
et us know if you have an	y questions.		
hank you and have a won	derful day!		
Smith Advisory Team	-		
Close Delete		C	Paply
Close Delete		-	керіу



How to send a message

1 From Message Centre, click on *New message*.

Message Centre	<section-header> Mar 20, 2025, 3:51:26 PM</section-header>		
Inbox S	ent Archives		New message
Date	Subject	From	
15:36	Your tax package for 2024 🧷	National Bank Financial	<u>ش</u>

- 2 Before writing to your wealth advisor's team, please take note:
 - For any questions related to transactions, please contact your wealth advisor's team directly.
 - > Also, this message is visible to all members of your wealth advisor's team.

To write a new message, please complete the steps below:

- **a.** Select the account.
- **b.** Write a subject.
- **c.** Write your message.
- Attach a document, if applicable. The filename must only contain letters, numbers and the following characters: . () - _. The maximum allowable file size is 25 MB.
- e. Click on Send.

Write to us	×
For any questions related to transactions, please contact your wealth advisor's team dire Please note that this message is visible to all members of your wealth advisor's team.	ectly.
Client ID	
Select account a	
Subject	
b	
Message	0/3000 characters
C	
	6
(d
Drag and drop a file or Se	lect a file
	About accepted file types 🕧

3 Once sent, you will see a confirmation window. A copy of your sent message is available under the *Sent* tab for 7 years.

Your wealth advisor's team will reply to your message promptly. For any urgent inquiries, please contact a member of your wealth management team.



How to change your Message Centre notifications

1 Go to your profile by clicking on your name located in the top right corner of the page.

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Accounts 🗸	Markets 🗸	Activities 🗸	Documents ~	Research 🗸	Get a wote Q Toolbox ~

- 2 To modify your notifications for Message Centre, follow the steps below:
 - a. Select Preferences.
 - b. Open the Manage my Message Centre sub-section.
 - c. You can activate notifications by checking the box. Or you can deactivate them by unchecking the box.
 - d. Enter the email address where you wish to receive notifications.
 - e. Click on Save.

Profile a Preferences Agreements	
Customize the different options in your account to personalize your experience.	
Manage my personal view	+
Manage my accounts	
Manage my documents and statements	H
Manage my Message Centre	b -
Receive email notifications	
ou will receive a notification when a new message is available online in your Message Centre.	
Activate email notifications test@test.com	



Need help with our online services?

Contact your wealth management advisor or our technical support team at **514-871-2470** or **1-888-751-1220** from Monday to Friday, 9 a.m. to 5 p.m. (ET).

nbfwm.ca

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