

# Single sign-on user ID guide

## Greater security with the single sign-on user ID

The login process for our platform is evolving to **enhance your security**, with multi-factor authentication using a validation code via text or email.

### The 3 advantages of a single sign-on user ID



#### 1. Simple

Use a single sign-on user ID and password for all your NBC platforms.\*



#### 2. Secure

Multi-factor authentication gives you enhanced security.



#### 3. Seamless

Navigate from the NBC online banking platform to the NBFWM platform with a single click.

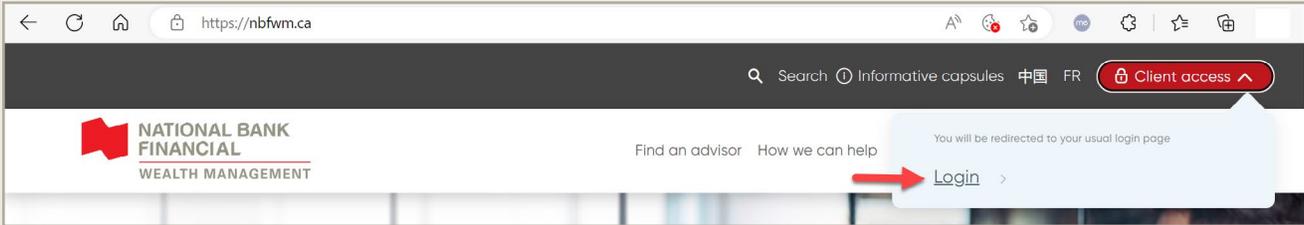
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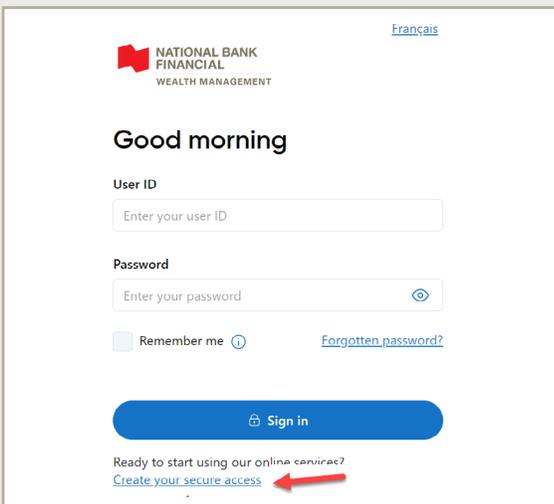
\*National Bank Personal Banking, National Bank Direct Brokerage (NBDB), Private Banking 1859 (PB1859), National Bank Financial (NBFWM).

# Create your secure access

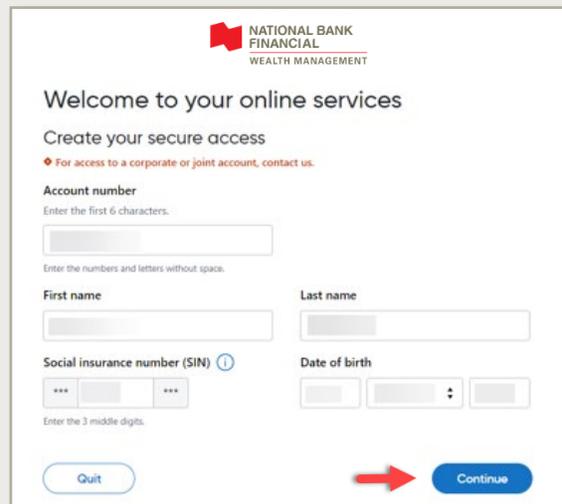
1 Go on our website [nbfwm.ca](https://nbfwm.ca), click on **Client access** and then select **Login**.



2 To create your new access, follow the **Ready to start using our online services?** link and click on **Create your secure access**.

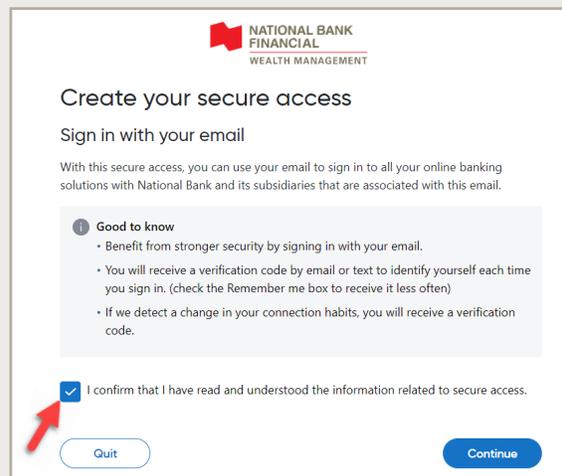


3 Fill out all the required information and click on **Continue**.



4 Read about the secure access information and check the box **I confirm that I have read and understood the information related to secure access**. Click on **Continue**.

If you already have an email user ID for one of your NBC online platforms, we will automatically associate it with your NBFWM account. Then go to step 7.



5 Enter the email that you want to use to connect to **all your National Bank platforms**. Click on **Continue**.

The screenshot shows the 'Create your secure access' page with the National Bank Financial Wealth Management logo at the top. The heading is 'Create your secure access' and the sub-heading is 'Choose your email ID'. There are two input fields: 'Email ID' and 'Confirm email ID'. Below the 'Email ID' field, there is a note: 'You will use this email to sign in. We will also contact you at this email should you forget your password.' Below the 'Confirm email ID' field, there is a note: 'The email and confirmation must be identical.' At the bottom, there are two buttons: 'Quit' and 'Continue'. A red arrow points to the 'Continue' button.

6 Enter a password of your choice that respects the listed requirements. Click on **Create my access**.

The screenshot shows the 'Create your secure access' page with the National Bank Financial Wealth Management logo at the top. The heading is 'Create your secure access' and the sub-heading is 'Choose your password'. There is a 'Password' input field with a strength indicator. Below it, there is a note: 'Choose a secure password. Use it only to sign in to your online banking solutions with National Bank and its subsidiaries that are associated with this email.' There are four minimum requirements listed: 'No spaces at the beginning or end', 'At least 12 characters', 'At least 1 uppercase letter', and 'At least 1 number'. There is a 'Confirm password' input field. At the bottom, there are two buttons: 'Quit' and 'Create my access'. A red arrow points to the 'Create my access' button.

7 Then, you will get a confirmation with your email user ID, which you can now use to sign in to the NBFWM Online Services platform. Click on **Sign in**.

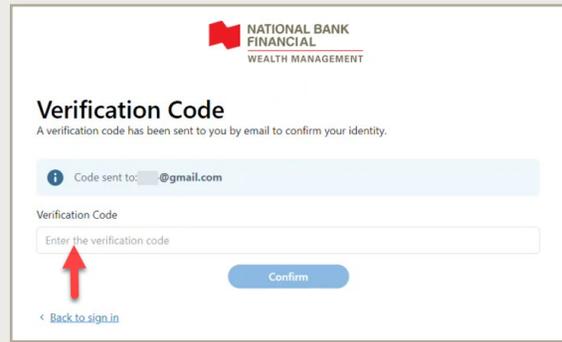
The screenshot shows the 'Create your secure access' page with the National Bank Financial Wealth Management logo at the top. The heading is 'Create your secure access' and the sub-heading is 'You're ready to sign in'. There is a green checkmark icon. Below it, there is a note: 'Use this email to sign in to your online banking solutions with National Bank and its subsidiaries that are associated with this email.' There are two input fields: 'Email ID' and 'Password'. The 'Email ID' field contains a placeholder '@gmail.com'. The 'Password' field has a note: 'Use the password you just created, or the password associated with your online bank with National Bank.' At the bottom, there is a blue box with an information icon and the text: 'You must sign in again to access your account.' Below that, there is a 'Sign in' button. A red arrow points to the 'Sign in' button.

8 The system will ask you to sign in again. **CAUTION: From now on, you must use the same email user ID and password that you created in steps 5 and 6 OR the existing NBC platform credentials.**

 If you check the **Remember me** box, you can keep the device in memory, so you won't need to enter a verification code each time you sign in.

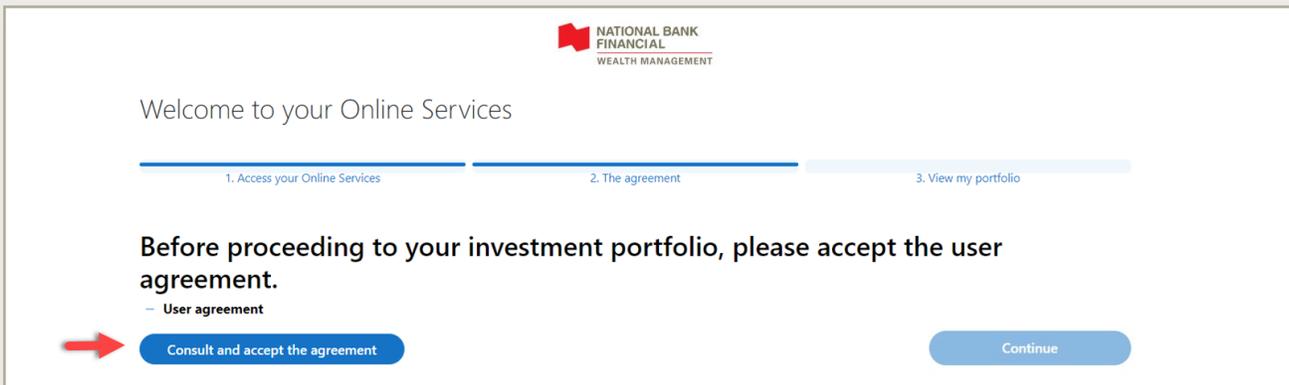
The screenshot shows the 'Good morning' sign-in page with the National Bank Financial Wealth Management logo at the top. The heading is 'Good morning'. There is a 'User ID' input field with the placeholder 'clientNBF@email.ca'. There is a 'Password' input field with a strength indicator. Below it, there is a 'Remember me' checkbox which is checked, and a 'Forgotten password?' link. At the bottom, there is a 'Sign in' button. A red arrow points to the 'Remember me' checkbox. There is also a 'Français' link in the top right corner.

- 9 You will receive a verification code by email. Enter the code, then click on **Confirm** to complete the sign-in.



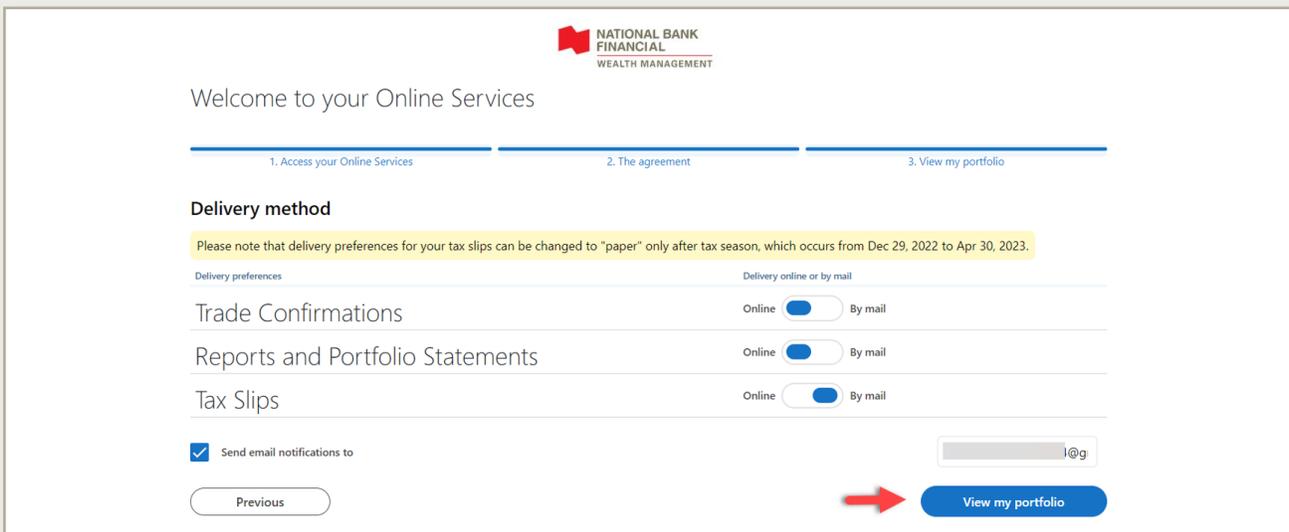
The screenshot shows the 'Verification Code' screen from National Bank Financial Wealth Management. At the top, the logo and name are displayed. Below the title, a message states: 'A verification code has been sent to you by email to confirm your identity.' There is a field for 'Code sent to:' with the value '@gmail.com'. Below that is a 'Verification Code' section with a text input field labeled 'Enter the verification code' and a blue 'Confirm' button. A red arrow points to the input field. At the bottom left, there is a link that says '< Back to sign in'.

- 10 Click on **Consult and accept the agreement** to view the details. Once accepted, you can click on **Continue**.



The screenshot shows the 'Welcome to your Online Services' screen. At the top is the National Bank Financial Wealth Management logo. Below the title is a progress bar with three steps: '1. Access your Online Services', '2. The agreement', and '3. View my portfolio'. The second step is currently active. Below the progress bar, the text reads: 'Before proceeding to your investment portfolio, please accept the user agreement.' Underneath, there is a link for '- User agreement'. At the bottom, there are two buttons: 'Consult and accept the agreement' (with a red arrow pointing to it) and 'Continue'.

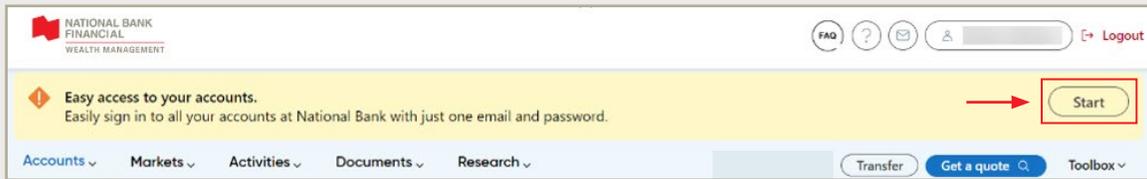
- 11 Lastly, you may choose your delivery preference, electronic or paper, for each type of document. Furthermore, you can choose to receive an email notification when a new document becomes available online. Click on **View my portfolio** to complete your access creation experience.



The screenshot shows the 'Delivery method' screen. At the top is the National Bank Financial Wealth Management logo. Below the title is a progress bar with three steps: '1. Access your Online Services', '2. The agreement', and '3. View my portfolio'. The second step is currently active. Below the progress bar, the text reads: 'Delivery method'. A yellow highlight box contains the text: 'Please note that delivery preferences for your tax slips can be changed to "paper" only after tax season, which occurs from Dec 29, 2022 to Apr 30, 2023.' Below this, there are three sections for delivery preferences: 'Trade Confirmations', 'Reports and Portfolio Statements', and 'Tax Slips'. Each section has two toggle options: 'Online' and 'By mail'. For 'Trade Confirmations' and 'Reports and Portfolio Statements', the 'Online' toggle is selected. For 'Tax Slips', the 'By mail' toggle is selected. At the bottom left, there is a checkbox labeled 'Send email notifications to' which is checked. To the right of this checkbox is a text input field with a placeholder 'l@g'. At the bottom, there are two buttons: 'Previous' and 'View my portfolio' (with a red arrow pointing to it).

# Switch from an 8 digit user ID to email user ID

1 To begin the process, please [Log in](#) and click on **Start** on the yellow banner that appears at the top of the screen.



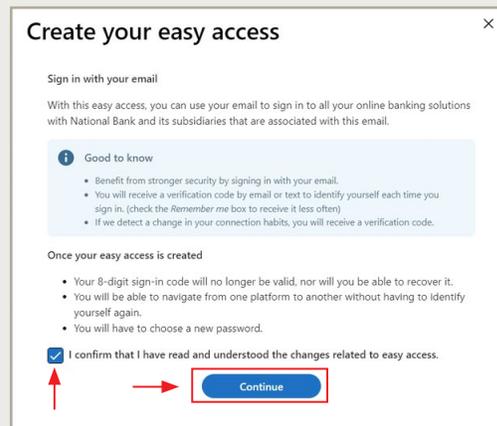
## Don't see the banner?

If you hold one of the account types below, your 8-digit user ID is still required for the moment. The change to the single sign-on user ID will be done later.

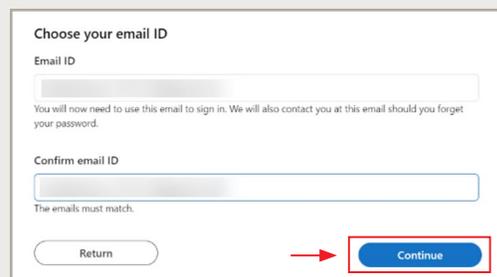
- › Legal entity accounts (company accounts)
- › Joint accounts
- › Special accounts (guardianship, trust, etc.)

2 Check the box **I confirm having read the information on easy access**. Click on **Continue**.

If you already have an email user ID for your NBC banking platform, we will automatically associate it with your NBFWM account. Please go to step 5.



3 Enter the email that you want to use to connect to **all your National Bank platforms**. Click on **Continue**.



4 Choose a password that respects all the criteria and click on **Create my access**.

The screenshot shows a 'Create your easy access' window with a close button (X) in the top right. Under 'Choose your password', there are two password input fields: 'New password' and 'Confirm password'. Below them are 'Minimum requirements' listed with green checkmarks: 'At least 12 characters', 'At least one uppercase letter', 'At least one number', and 'No spaces at the beginning or end'. At the bottom, there are two buttons: 'Return' and 'Create my access'. A red arrow points to the 'Create my access' button.

5 A box will appear with your email user ID, which you can now use to sign in to the NBFWM Online Services platform. Click on **Sign-in**.

The screenshot shows a 'Create your easy access' window with a green checkmark icon and the text 'You're ready to sign in'. Below this, it says 'Use this email to sign in to your online banking solutions with National Bank and its subsidiaries that are associated with this email.' There are two rows of information: 'Email ID' with the value 'testbattisseurs+TISIM@gmail.com' and 'Password' with the instruction 'Use the password you just created, or the password associated with your online bank with National Bank.' At the bottom, there is a blue box with an information icon and the text 'You must sign in again to access your account.' Below this, there are two buttons: 'Return' and 'Sign-in'. A red arrow points to the 'Sign-in' button.

6 The system will ask you to sign in again. **CAUTION: From now on, you must use the same email ID and password that you created in steps 3 and 4 OR the existing NBC banking platform credentials.**

 If you check the **Remember me** box, you can keep the device in memory, so you won't need to enter a verification code each time you sign in.

The screenshot shows a 'Good morning' sign-in screen. It has a 'User ID' field with the value 'clientNBF@email.ca' and a 'Password' field. Below the password field is a checked checkbox for 'Remember me' with an information icon, and a link for 'Forgotten password?'. At the bottom, there is a blue 'Sign in' button with a lock icon. Below the button, it says 'Ready to start using our online services?' with a link for 'Create your secure access'. A red arrow points to the 'Remember me' checkbox.

7 You will receive a verification code by email or text. Enter the code, then click on **Confirm** to complete the sign-in.

The screenshot shows a 'Verification Code' screen with the National Bank Financial Wealth Management logo at the top. It says 'There may be a delay before receiving your code.' Below this is a blue box with an information icon and the text 'Code sent to: XXX-XXX-XXXX'. There is a 'Verification Code' input field with the value 'XXXXXX'. At the bottom, there is a blue 'Confirm' button. A red arrow points to the 'Confirm' button. At the bottom left, there is a link for 'Back to sign in'.

# Log in with multi-factor authentication (MFA)

- 1 To log in to [NBFWM Online Services platform](#), please enter your email user ID and password. Then, click on **Sign in**.
- 2 The system will send a verification code either by email or text.

NATIONAL BANK FINANCIAL WEALTH MANAGEMENT

Français

Good morning

User ID  
clientNBF@email.ca

Password  
.....

Remember me [Forgotten password?](#)

**Sign in**

Ready to start using our online services?  
[Create your secure access](#)

NATIONAL BANK FINANCIAL WEALTH MANAGEMENT

## Verification Code

Select the delivery method that is most convenient for you.

Receive by text  
+1 XXX-XXX-XXXX

Receive by email  
@gmail.com

[Back to sign in](#)

- 3 Please enter the code and click on **Confirm** to complete the login.

NATIONAL BANK FINANCIAL WEALTH MANAGEMENT

## Verification Code

There may be a delay before receiving your code.

Code sent to: XXX-XXX-XXXX

Verification Code  
XXXXXX

**Confirm**

[Back to sign in](#)

Here is an example of the verification code you will receive via email or text.

Here's your verification code

EC Espace client / Client centre <noreply@cloudbnc.ca>  
A @gmail.com

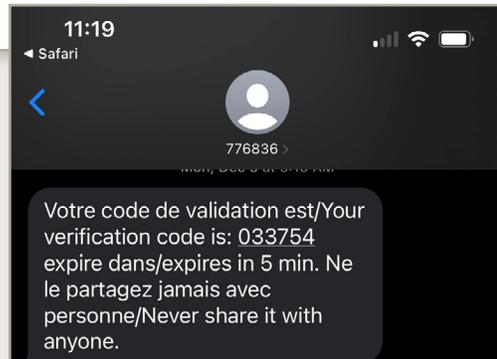
PRUDENCE/CAUTION - EXTERNE/EXTERNAL

Hello Lorenzo,

Make sure you enter the following verification code within the next 10 minutes. Never share this code with anyone.

Did you know? You can choose to receive your verification code by text message. Add your mobile number under your **Profile** section.

Thanks!



# Reset password

The following password reset process is only applicable for **email user ID**.

**Reminder:** The new password will be applicable for **all National Bank platforms** (NBC, NBFWM, NBDB or PB1859) linked to the email user ID.

1 Click on **Forgotten password?**

Good morning

User ID  
clientNBF@email.ca

Password  
.....

Remember me [Forgotten password?](#)

[Sign in](#)

Ready to start using our online services?  
[Create your secure access](#)

2 Enter your email user ID and click on **Continue**.

Create a new password

Provide the following information to create a new password  
For corporate or joint accounts, please contact us.

Your user ID  
xx@xx.ca

[Cancel](#) [Continue](#)

3 Please fill in the required information and click on **Continue**.

Forgotten password

You will be able to create a new one.

Email ID  
@gmail.com

Date of birth  
Day Month Year

Which National Bank product do you hold?  
 Brokerage account (NBDB, NBF, PB1859)  
 Debit card

[I hold another bank product](#)

Account number  
Enter your account number

Phone number  
Enter your phone number

I'm not a robot

[Continue](#)

4 Enter the verification code sent by text or email and click on **Confirm**.

Didn't receive the code by text? You can choose to have it sent to your email.

Verification code

A verification code has been sent to you by email to confirm your identity.

Code sent to  
t...4@gmail.com

Verification code  
Enter your code

[Confirm](#)

[Back to sign-in](#)

5 Choose a new password and enter it in **New password** and **Confirm**. The password must respect the listed criteria in order to continue. Click on **Confirm**.

**New password**

You have been identified successfully and can now choose a new password.

**New password**

Choose a secure password that you only use to connect to our online banking solutions. It must be different than your previous ones.

.....

GOOD

**Minimum requirements:**

- No spaces at the beginning or end
- At least 12 characters
- At least one number
- At least one uppercase letter

**Confirm password**

.....

**Confirm**

[Back to sign-in](#)

**Need help?**  
Contact us at 1 800 363-3511

6 The password is now modified. **Reminder:** The new password is applicable for all your NBC platforms. Click on **Back to sign-in page**.

✓

**Your new password was saved.**

Use this password to sign in to all your online banking solutions with National Bank and its subsidiaries that are associated with this email.

**Back to sign-in page**

7 Enter your email user ID and the password you just chose. **The process is now complete.**

User ID

clientNBF@email.ca

Password

.....

Remember me ⓘ [Forgotten password?](#)

**Sign in**



### 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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