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

Individual Plans	Business Plans Enterprise	
	Individual	Personal Pro
Secure and ac	cess your personal files from anywhere.	Upgrade your personal plan for more flexibility and storage sp
	Free	14 CAD per month
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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.

Full Name	DOX
Email Address	Easily access and share your work on the go
Password	and omine
Confirm Password	
Phone Number] 🛁 🚄 🦷
Canada -	
I'm not a robot	Open in Box App
Privacy - Terms	Download for free
Submit	View on Box Mobile Site

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								2
1 Click on your initials (top-right corner) and then "Account settings"	COX All File. Browns, Drawk J7 Heles d Admin Canade Frank Cong Space areas for Cong Space areas for	Search Film and Fables All Files • Name 		≖- a Get More Storage	Updated -	se View Profile	Certification Statements	eve Profile count Section plates plates pes etp pres thacey Policy cknowledgeme
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- 2 Click on "Sharing", then scroll down until you see the "Email notification" section
- > Check all the boxes
- > Click "Save changes"

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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 Image: State of the ima

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

> Just click on the "Not a part of National Bank?" 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 your 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 2 Click on "Reset password" you received by email from your Advisor or their team Sign In to Your Account Signi Not you? Password Enter Your Password Reset Password **3** Enter the email address you used 4 You will receive an email. Click on "Reset to set up your Box account password" in the email **Reset Password** box Your new Box password awaits Email Address Enter Your Email You recently requested to reset your password. Please click the button below to start the Reset Passv If you did not request a password change, you may ignore this message and your pass Sian In will remain unchanged. 5 A new internet window will pop up **6** You can now sign into your account and you will be asked to set up with the new password a 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.



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