

# New Secure Exchange Functionality



National Bank Financial (NBF) will now offer a simple, fast and secure solution to share confidential documents with your Advisor and their team.

## The Box app explained in 7 steps:

### 1 Create your Box account

- > Choose your package (we recommend the free individual package).



### 2 Enter the information requested

- > Fill in the form with the information requested.



### 3 Create a strong password

- > Your password should be at least 12 characters long, alphanumeric, plus upper case and special characters.
- > Use a sentence or words that are easy for you to remember, but don't make sense (e.g., ParisUnicornApril14).



Also, since your Box space will be used to exchange confidential information with NBF, do not share your password or your Box space with anyone else. This space is for your personal use only<sup>1</sup>.

### 4 Validate your email address

- > A confirmation email was sent to you by Box. Simply click on the **"Verify Email"** button to validate your account.



5 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](mailto:noreply@box.com) asking you to work on a shared Box folder

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

### 6 Congratulations! You have created a Box account!

- > Once your Box space has been created, your Advisor will contact you by phone to ensure that you have completed the creation process and that everything is functional.
- > Don't forget, neither your Advisor nor any National Bank employee will contact you to obtain your password.



### 7 Access your shared folder

An invitation from [noreply@box.com](mailto:noreply@box.com) will be sent to you by a member of your investment Advisor's team. Simply click on the link.

- > Didn't receive it? Check your junk mail folder (spam), it may be there!



## Lost your password?

Click on the **"I can't access my account"** link and follow the instructions. Since your Box account is a personal account, your Advisor will not be able to provide you with a new password to access your personal space.

## More details

**No instructions will be accepted if sent through Box or email. All instructions must be transmitted to 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.