




NBI Portal for client account access

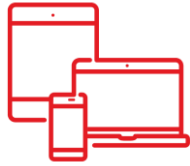
User guide

Table of contents

	Configuration requirements	1
	Access for IA assistants	2
	Summary of possible actions	3

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Configuration requirements



Browser and application

Computer	Edge Chromium
	Google Chrome
	Jaws
Tablette	Safari
Cellphone	Chrome
	Safari

If you are using a different web browser than those mentioned above, you may experience difficulties with some of the features in the NBI Portal for client account access.

NBI Portal for client account access

Access for IA assistants

To grant their IA assistant access to the NBI Portal for client account, investment advisors can contact us by email or phone.



Email

Email **dealer.services@nbc.ca** with the following information:

- › IA assistant's name
- › assistant's email address
- › dealer code
- › all delegated representative codes



Telephone

Contact us at **1 877 463-7627**.

The advisor must be on the phone to confirm access authorization.

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Summary of possible actions

How to navigate the portal homepage?

Generate tax slips	Generate all the tax slips you need for specific clients or accounts
Generate reports	Whether for clients, accounts or securities, you can find the following reports in this section: Evaluation report, Transaction report, Free units report, Systematic plan report, Holder report
Deferred sales charge report	This report generates information for all of your customers
Trailer fees report	This report generates information for all of your customers