



MULTI-FACTOR AUTHENTICATION (MFA) – iA PRIVATE WEALTH MOBILE APP



Okta Verify App Installation Guide



OKTA VERIFY APP

When you first log into the iA Private Wealth mobile app, you will be prompted to set up multi-factor authentication (MFA).

To set up this authentication method, you will need to download the Okta Verify App on your mobile device. Once downloaded follow the steps below.



SET-UP TAKES JUST A FEW MINUTES

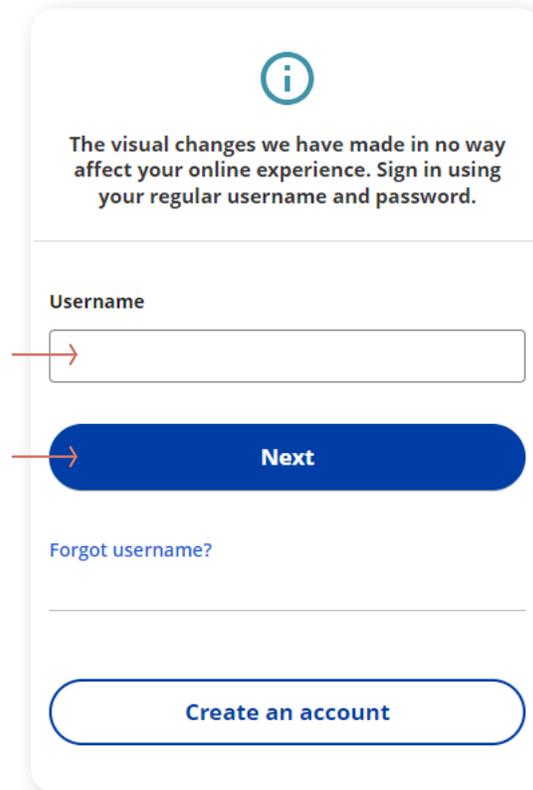
Step 1

Open the iA Private Wealth mobile app and click on **Login**.



Step 2

Enter your **username**, then click **Next**.



Step 3

Enter your **password**, then click **Next**.

The screenshot shows a user interface for 'IAPWClient_Mfa2'. At the top, there is a header with a user icon and the text 'IAPWClient_Mfa2'. Below this is a section titled 'Password' with a text input field. A red arrow points to the input field. To the right of the input field is an eye icon. Below the input field is a large blue button labeled 'Next'. A red arrow points to the 'Next' button. At the bottom left, there are two links: 'Forgot password?' and 'Back to sign in'.

Step 4

Click on the **Select** button in the Okta Verify section.

The screenshot shows a user interface for 'IAPWClient_Mfa2'. At the top, there is a header with a user icon and the text 'IAPWClient_Mfa2'. Below this is a section titled 'You must enable one or more Multi-Factor Authentication (MFA) to add an additional layer of security when logging into your account.' Below this is a list of MFA options. The first option is 'Okta Verify', which is highlighted with a red box. It includes a checkmark icon, the text 'Okta Verify is an authenticator app, installed on your phone, used to prove your identity.', and a blue 'Select' button. A red arrow points to the 'Select' button. The second option is 'Phone', which includes a phone icon, the text 'Verify with a code sent to your phone.', and a blue 'Select' button.

Step 5

You have the option to receive an email or text message (SMS) to set up Okta Verify. For text, proceed to step 9.

The screenshot shows a user interface for 'IAPWClient_Mfa2'. At the top, there is a header with a user icon and the text 'IAPWClient_Mfa2'. Below this is a section titled 'Which option do you want to try?' with two radio button options: 'Email me a setup link' (selected) and 'Text me a setup link'. A red box highlights these options. Below the options are two buttons: a large blue 'Next' button and a white 'Back' button with a blue border. At the bottom left, there is a link: 'Back to sign in'.

Step 6

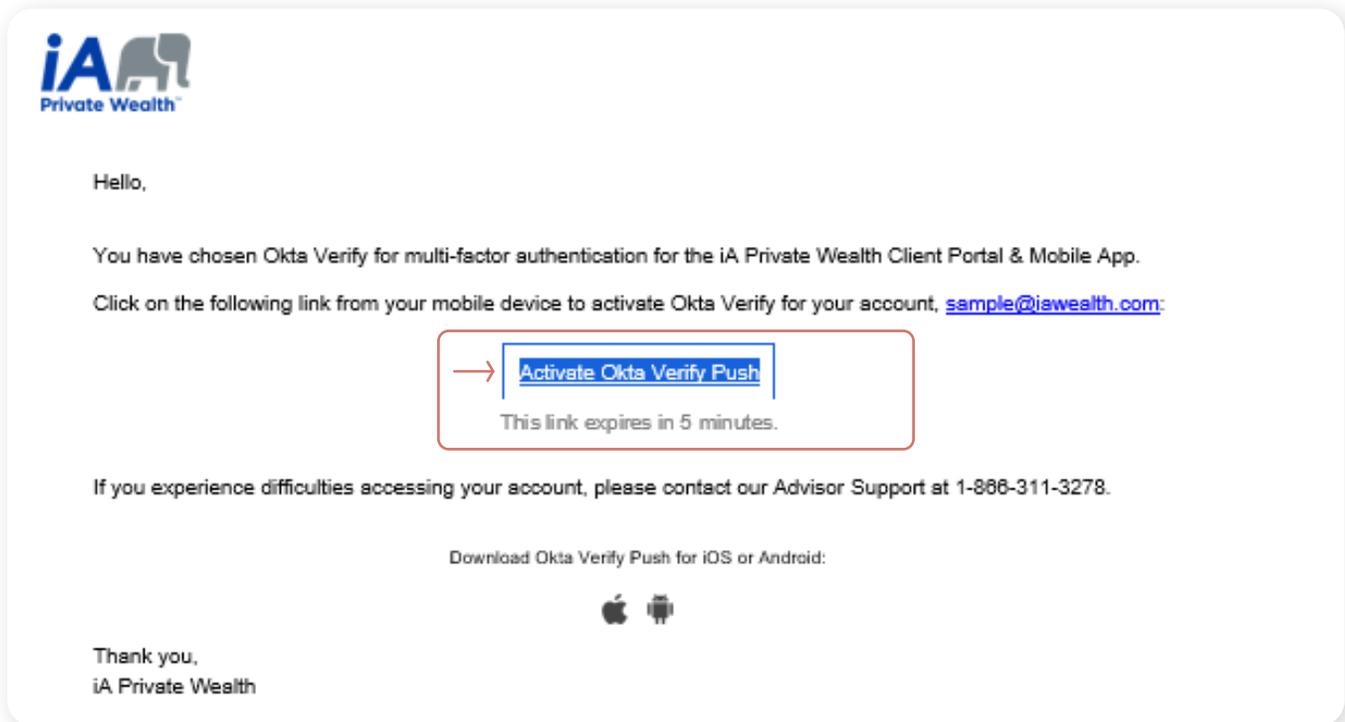
Enter your email address to receive the setup link and click on **Send me the setup link**.

The screenshot shows a user interface for 'IAPWClient_Mfa2'. At the top, there is a header with a user icon and the text 'IAPWClient_Mfa2'. Below this is a section titled 'Email' with a text input field. A red arrow points to the input field. Below the input field is the text 'Make sure you can access the email on your mobile device.' Below this are two buttons: a large blue 'Send me the setup link' button and a white 'Back' button with a blue border. At the bottom left, there is a link: 'Back to sign in'.

Step 7

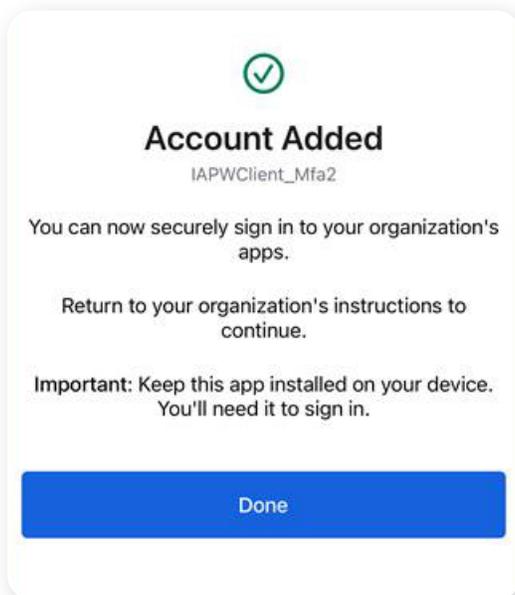
Once you click **Send me the setup link**, you will receive an email. Click on **Activate Okta Verify Push**.

Note: If you do not currently have the Okta Verify app, you will be prompted to download the app to your device.



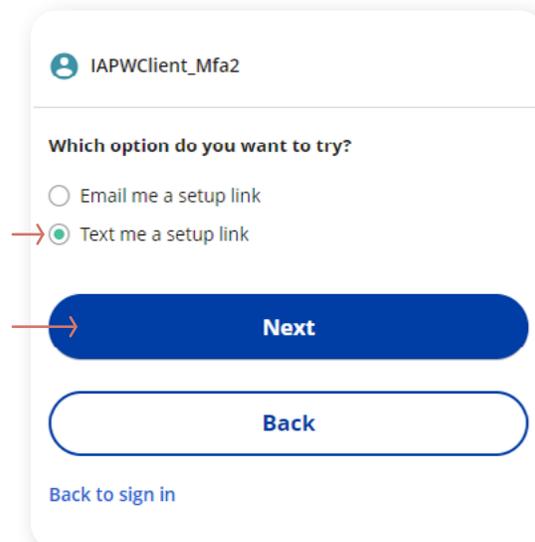
Step 8

The Account Added screen will appear.



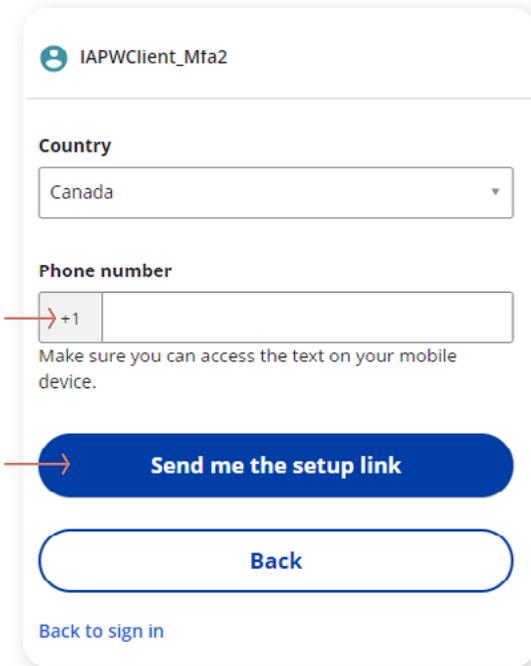
Step 9

To receive a setup link via text message (SMS), click on **Text me a setup link**, and then click on **Next**.



Step 10

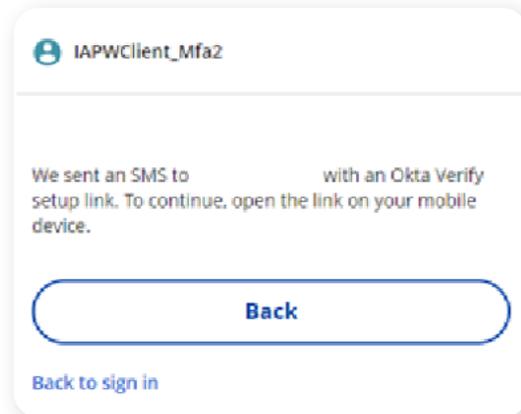
Enter your mobile phone number to receive the setup link, and click on **Send me the setup link**.



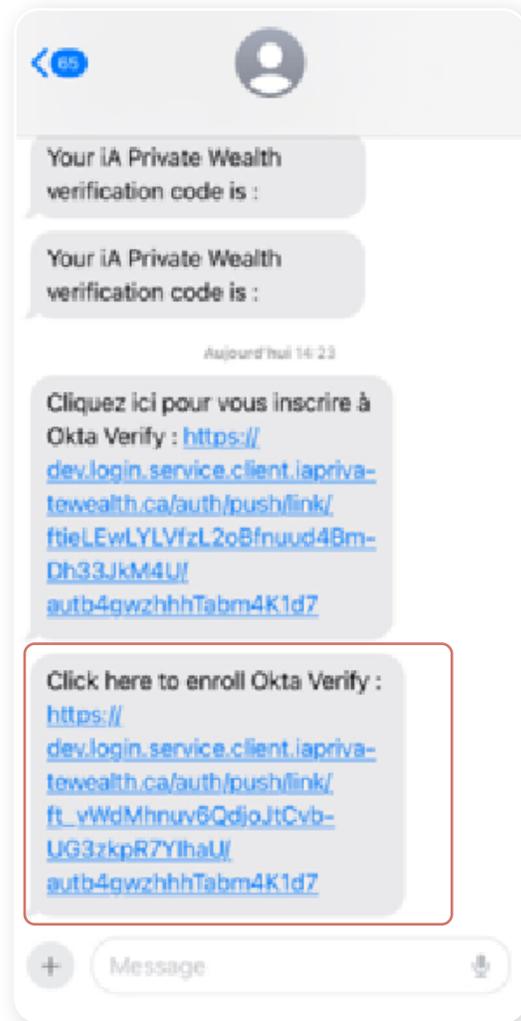
The screenshot shows a form titled "IAPWClient_Mfa2". It has a "Country" dropdown menu set to "Canada". Below that is a "Phone number" field with a "+1" prefix and a red arrow pointing to it. Underneath the phone number field is the text: "Make sure you can access the text on your mobile device." At the bottom of the form are two buttons: a blue "Send me the setup link" button with a red arrow pointing to it, and a white "Back" button. At the very bottom is a link that says "Back to sign in".

Step 11

A confirmation window will appear. Once you receive the text message, click on the setup link.

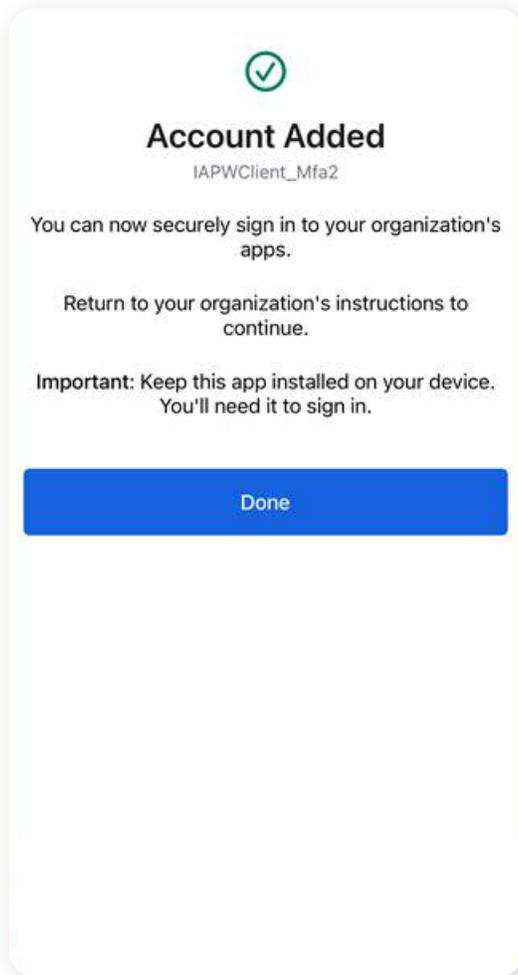


The screenshot shows a confirmation window titled "IAPWClient_Mfa2". The text reads: "We sent an SMS to [redacted] with an Okta Verify setup link. To continue, open the link on your mobile device." Below the text is a white "Back" button. At the bottom is a link that says "Back to sign in".



The screenshot shows an SMS message from "IAPWClient_Mfa2". The message content is: "Your IA Private Wealth verification code is :". Below this is a timestamp "Aujourd'hui 14:23". The main body of the message contains a link: "Cliquez ici pour vous inscrire à Okta Verify : <https://dev.login.service.client.iaprivatewealth.ca/auth/push/link/ftieLEwLYLVfzL2oBfnuud4Bm-Dh33JkM4U/autb4gwzhhhTabm4K1d7>". Below this link is another link: "Click here to enroll Okta Verify : https://dev.login.service.client.iaprivatewealth.ca/auth/push/link/ft_vWdMhnuv6QdjoJtCvb-UG3zkpR7YIhaU/autb4gwzhhhTabm4K1d7". At the bottom of the message is a "Message" input field with a plus sign and a microphone icon.

The Account Added screen will appear.



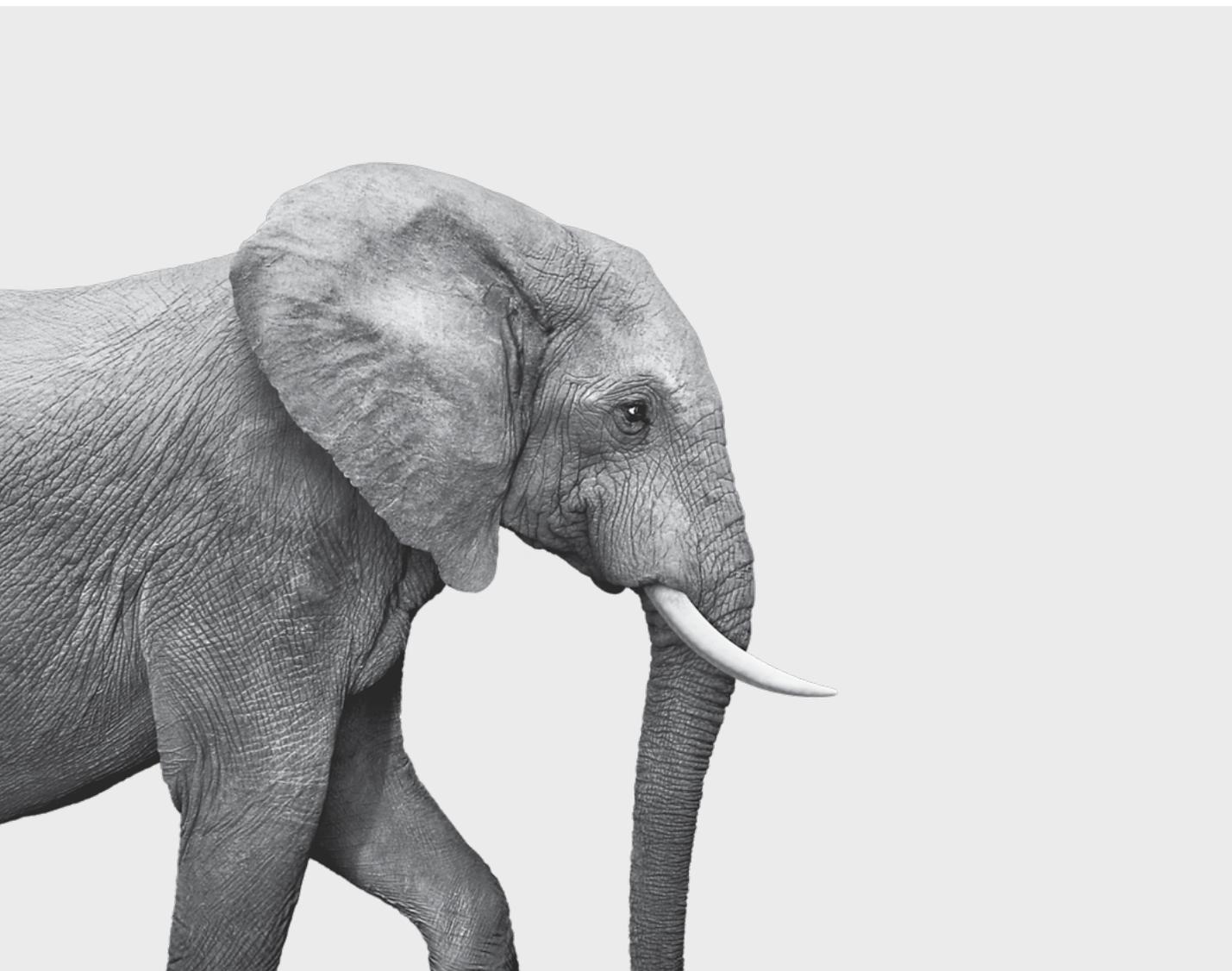
After setting up Okta Verify, you may set up a second authentication method (optional).

You will be asked if you want the system to remember your multi-factor authentication preference by selecting "**Don't ask me for a verification code**" or "**Ask me for a code at each login**". If you select "**Ask me for a code at each login**", the multi-factor authentication method you selected will appear each time and you will be asked to authenticate before you can log in.



You must keep the Okta Verify app on your mobile device

for future logins into the iA Private Wealth mobile app, as you may be prompted to provide a unique security code which will be generated in the Okta Verify app.



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