

# Box® - Secure Exchange Functionality

National Bank Financial Wealth Management now offers a simple, fast and secure solution to share your confidential documents with your Advisor and their team.

## How to create your Box account

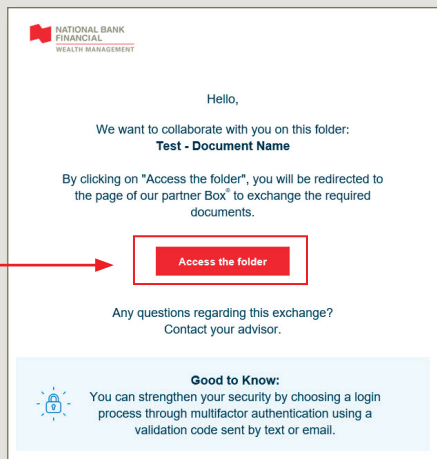


Procedure to follow **if you received** an email from [noreply@notifications.bnc.ca](mailto:noreply@notifications.bnc.ca) asking you if you want to collaborate on a Box folder

### 1 Open the email you received from [noreply@notifications.bnc.ca](mailto:noreply@notifications.bnc.ca)

**Careful!** This email may end up in your "spam" folder. Please make sure to look in it.

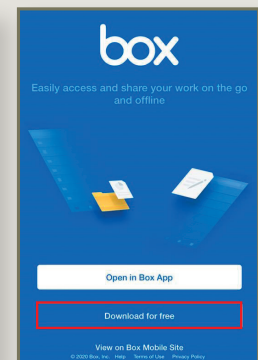
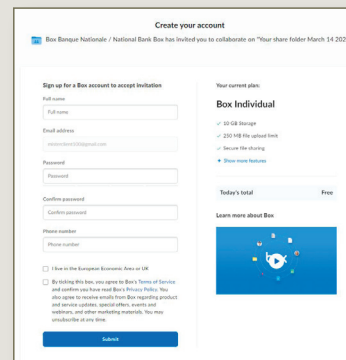
- › Click on **"Access the folder"** in the email



### 2 This page will open in your Internet browser

- › Fill in all the fields
- › If you are given the choice, we recommend choosing the free program
- › Click on **"Submit"**

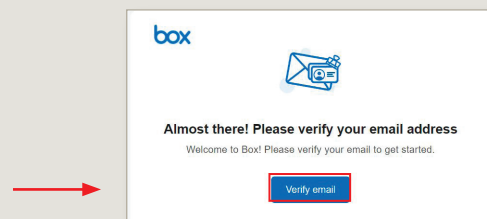
The Box application can also be downloaded on your usual platforms.



### 3 You will receive a confirmation email at the address you entered when creating your account

**Careful!** This email may end up in your "spam" folder. Please make sure to look in it.

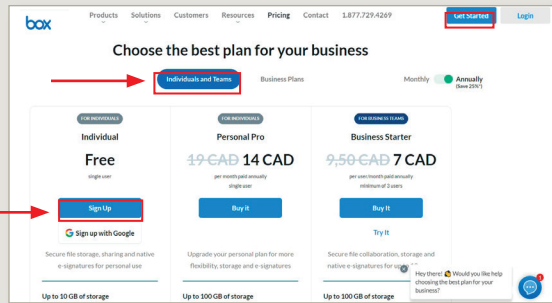
- › Click on **"Verify email"**



## Procedure to follow to open an account **if you didn't received** an email from [noreply@notifications.bnc.ca](mailto:noreply@notifications.bnc.ca)

### 1 Go to [box.com](https://box.com)

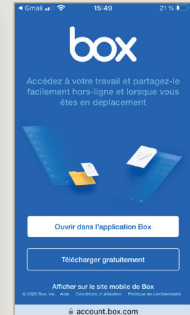
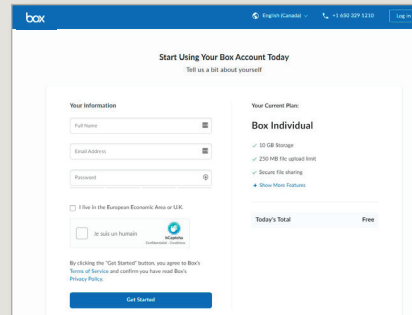
- › Click on **"Get started"**
- › Click on **"Individuals and Teams"**
- › Choose the Individual offer and click on **"Sign Up"**



### 2 This page will open in your Internet browser

- › Fill in all the fields
- › Click **"Submit"**

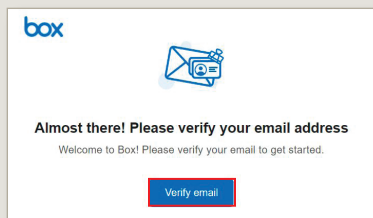
The Box application can also be downloaded on your usual platforms.



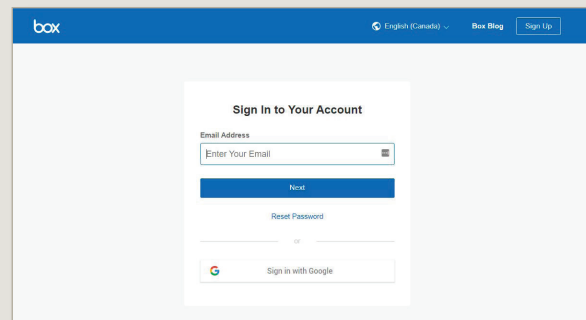
### 3 You will receive a confirmation email at the address you entered when creating your account

**Careful!** This email may end up in your "spam" folder. Please make sure to look in it.

- › Click on **"Verify email"** in the email



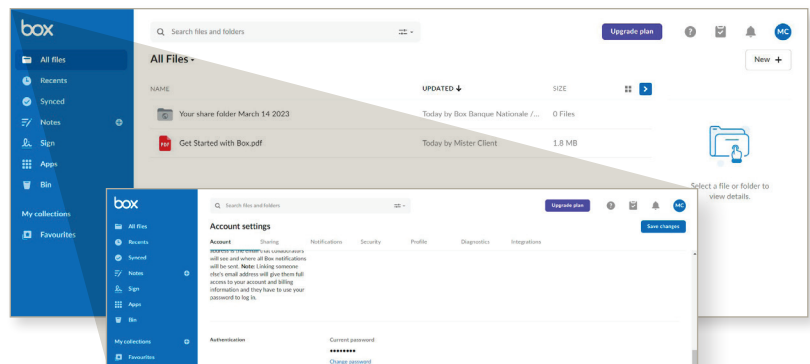
### 4 Sign in to your account



## Congratulations! Your Box account is now set up!

Here is what your Box account should look like.

- › The documents that will be shared between you and your Advisor or a member of their team will be in the folder created for you.
- › Open the folder to add or retrieve a document. If you place a document outside the folder, your Advisor or their team won't be able to see it.

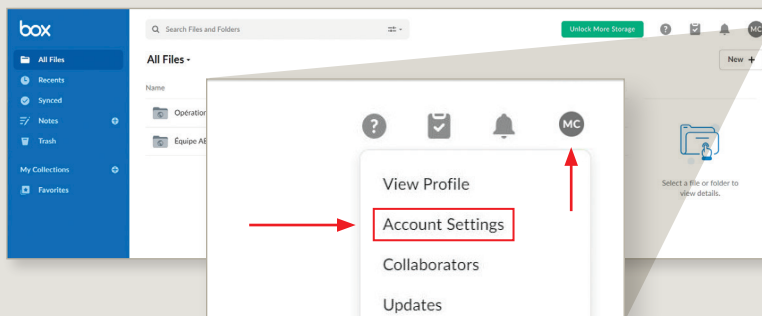


In order to know that your Advisor or a member of their team wants to share a document with you, we suggest that you turn on the notifications in your Box account.

## Here's how to do it

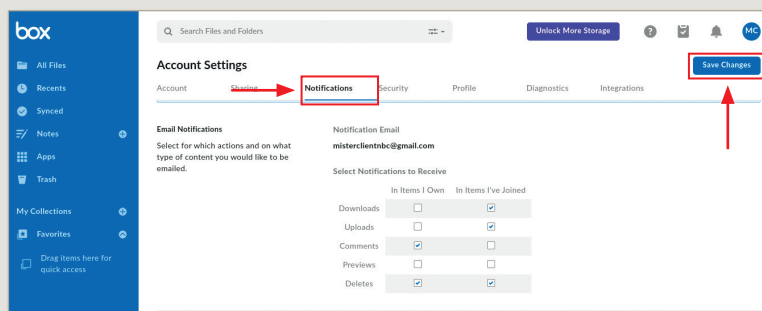


### 1 Click on your initials (top-right corner) and then "Account settings"



### 2 Click on "Notifications"

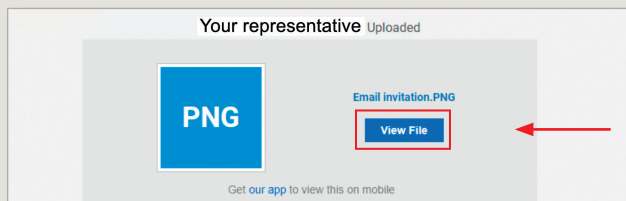
- › Check all the boxes that interest you
- › Click "Save changes"



## How to access documents shared by your Advisor or their team

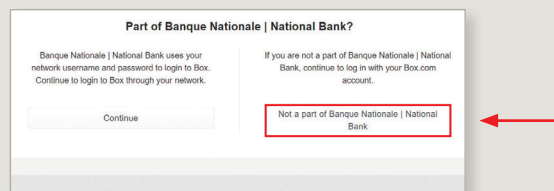


### 1 Sign in to your Box account at [box.com](https://box.com) OR click on the link from the notification email you received



### 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](https://box.com)

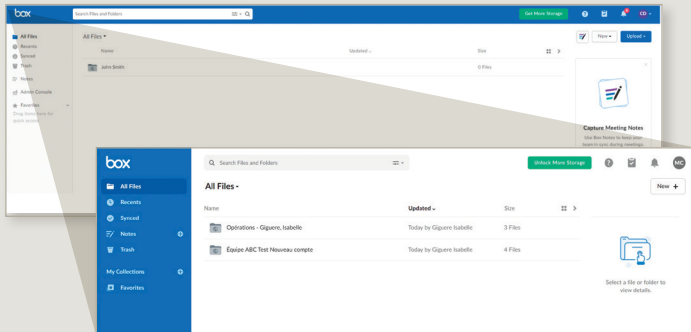
- › Enter your email address
- › Enter your password
- › You will see the document your Advisor or a member of their team shared with you

## How to share a document with your Advisor or their team



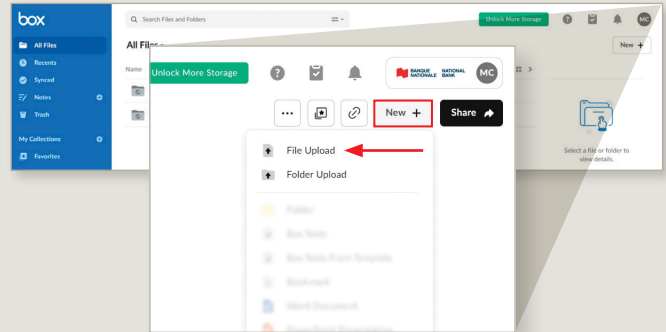
### 1 Sign in to Box at [box.com](https://box.com)

### 2 Click on the shared folder



### 3 Add a document

- Click on **"New +"**, then on **"File upload"**; click on the file you wish to share
- Once uploaded, the file will appear in the folder and your Advisor or a member of their team will be able to access it



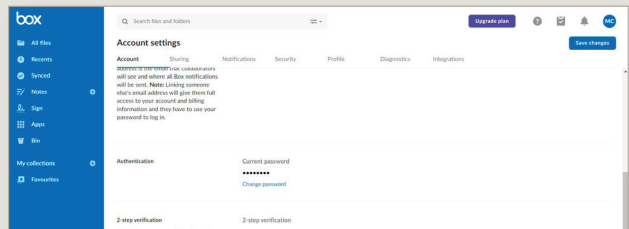
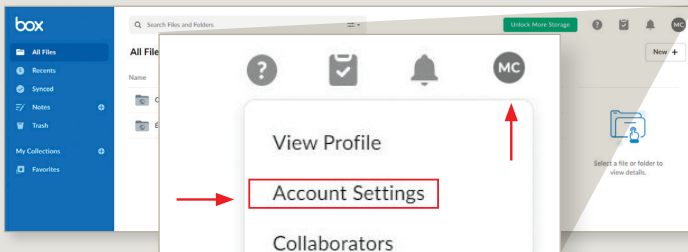
## Two-factor authentication



You can strengthen your security by choosing a login process through multifactor authentication using a validation code sent by text or email.

### 1 Click on your initials (in the top-right corner) and then on **"Account settings"**

### 2 In the Account tab, go to the **"Two-step authentication"** section



### 3 Click on **"Configure"** and select your preferred verification method

### 4 Enter the confirmation code you receive

Set up 2-step verification

Select a sign in option:

Authenticator app **RECOMMENDED**  
You will receive a code from an authenticator app to sign in. [View suggested authenticator apps](#)

**SMS text message**  
You will receive an SMS text message on your phone with a code to sign in.

Email  
You will receive an email with a code to sign in.

Cancel Next

Configuration de la vérification en deux étapes

Un code de confirmation a été envoyé par SMS au numéro de téléphone que vous avez indiqué. Veuillez saisir le code ci-dessous.

Pays  
Canada (+1)

Numéro de portable

Code de confirmation

Annuler Continuer

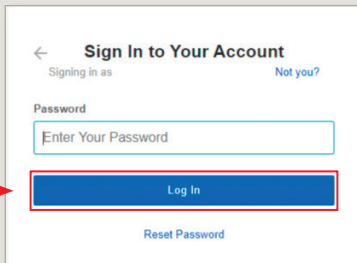
## How to reset your password



Have you forgotten your Box password? Don't worry, simply follow these steps!

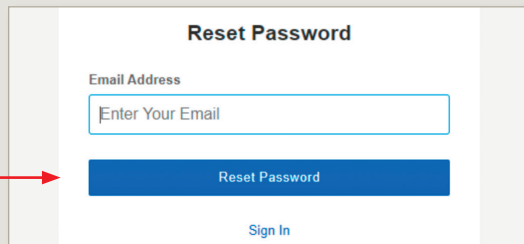
**1** Go to [box.com](https://box.com) or click on the link you received by email from your Advisor or a member of their team

**2** Click on **"Reset password"**



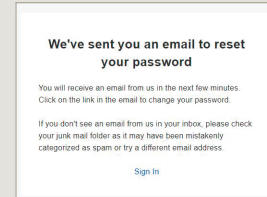
The screenshot shows the 'Sign In to Your Account' page. It has a back arrow, 'Signing in as' and 'Not you?' links, a 'Password' field with the placeholder 'Enter Your Password', a blue 'Log In' button, and a 'Reset Password' link below it. A red arrow points to the 'Log In' button.

**3** Enter the email address you used to set up your Box account



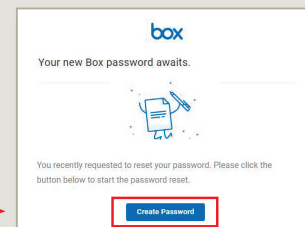
The screenshot shows the 'Reset Password' screen. It has an 'Email Address' field with the placeholder 'Enter Your Email', a blue 'Reset Password' button, and a 'Sign In' link below it. A red arrow points to the 'Reset Password' button.

**4** You will receive an email. Click on **"Reset password"** in the email



**5** You will receive an email with the subject line **"Your new password"** and another with **"Your new password is ready"**

› Here, click on **"Create a password"** and enter your new password.



**6** You can now sign into your account with the new password

- › Enter your email address
- › Enter your new password

### Safety above all

No transaction or request will be initiated through Box or email. To initiate a transaction or request, contact your Advisor and their team 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.

Your data in these documents will be used in accordance with our [Privacy policy](#).