



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

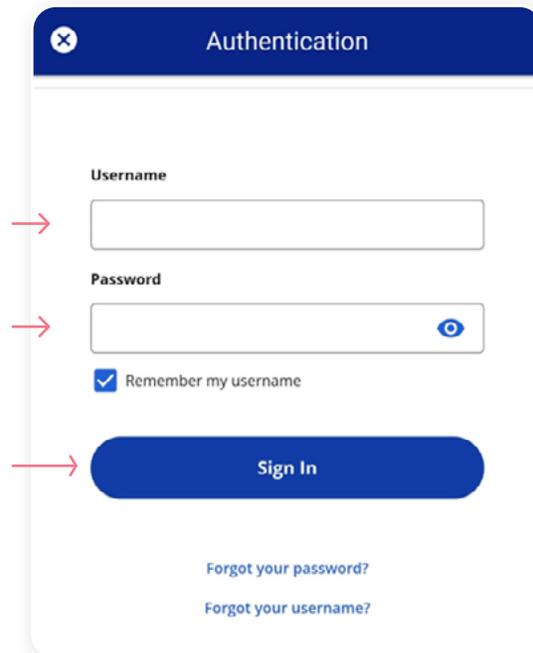
Step 1

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



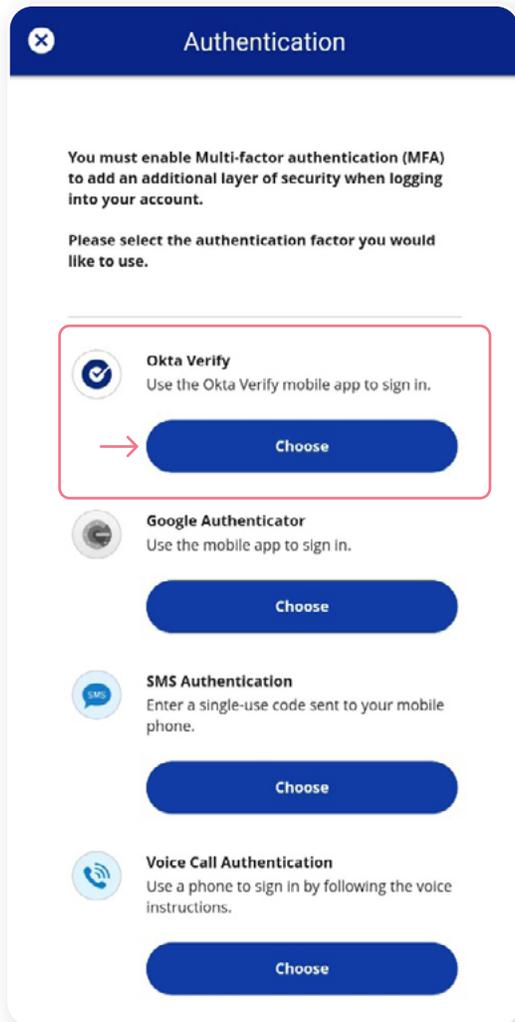
Step 2

Enter your **username** and **password**, then click **Sign In**.



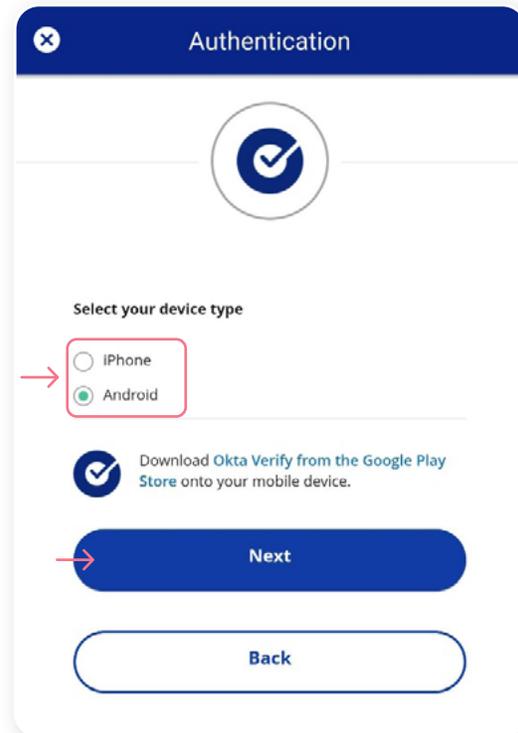
Step 3

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



Step 4

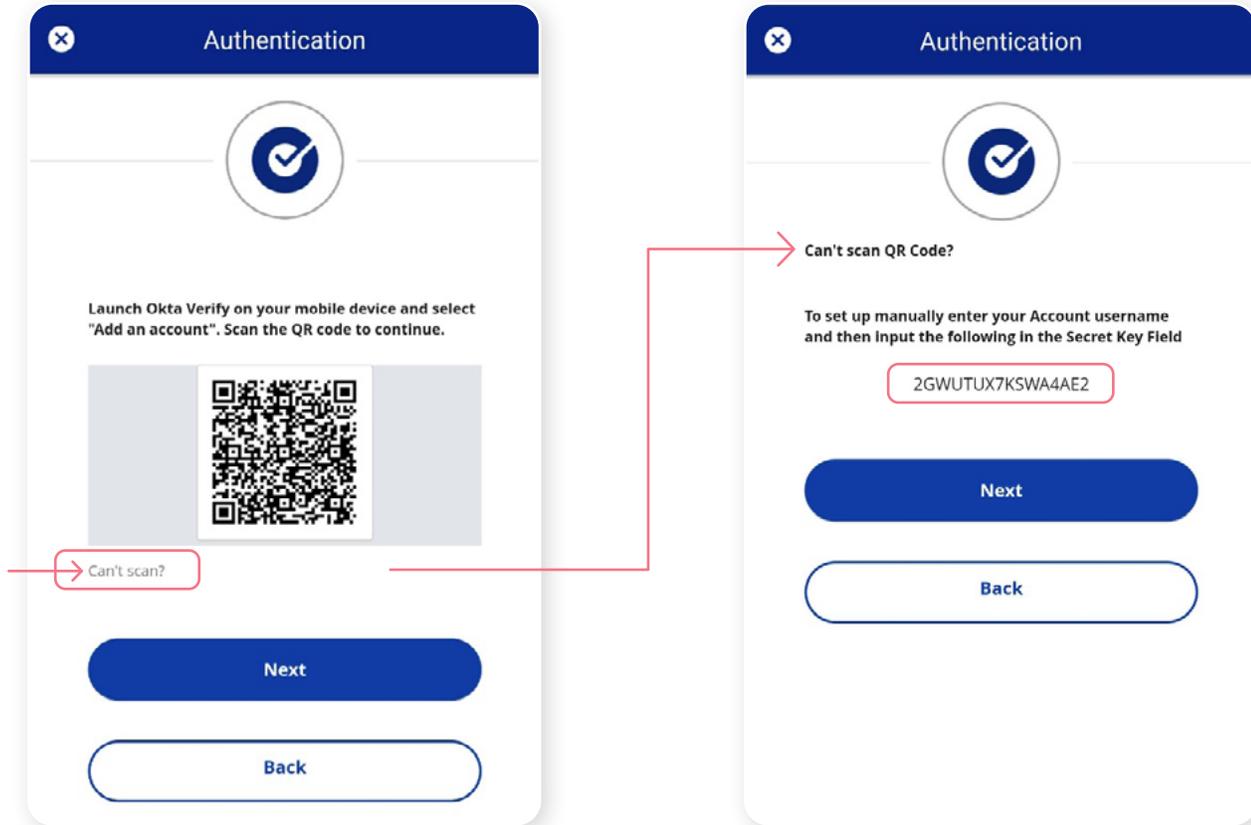
Next, you will be asked to **select your device type**, either iPhone or Android. Then, select **Next**.



Step 5

You will be asked to open the Okta Verify app on your mobile device, however, because you are already on your mobile device, you will be unable to scan the QR. To proceed, click **Can't scan?**

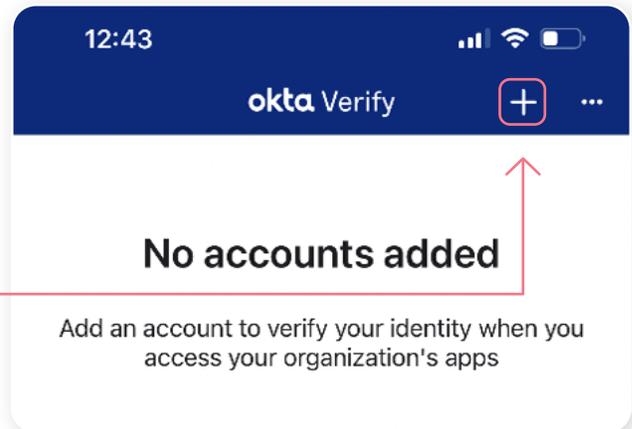
A unique setup key will appear on the next screen. Copy the setup key or write it down, as you will need to enter it in the Okta Verify app.



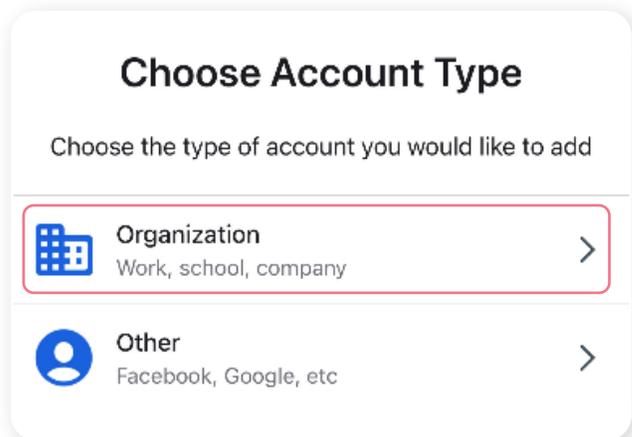
Step 6

On your mobile device, launch the Okta Verify app.

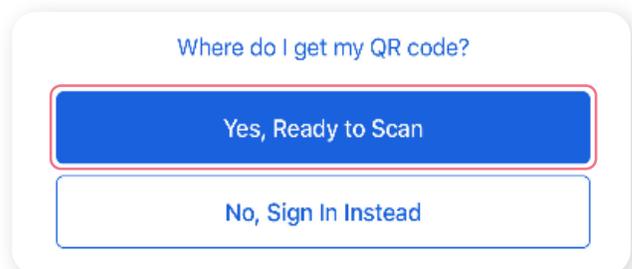
To set up an account for the the iA Private Wealth mobile app, click on '+' sign button shown in the top right corner of your device.



Click on **Other**.



Click **Enter Key Manually**.



Step 6 (continued)

Next, enter your **Client Portal username** and paste or type the **security key** that is displayed in the iA Private Wealth mobile app, then click **Add Account**.

Account Name

Example: My Work Account

Key

Your key can be found in the instructions you received. This is not your password

Add Account

Your account has now been added.
Click **Done**.

Okta Verify

Account Added

ELUM17QMA0

You can now securely sign in to your organization's apps.

Return to your organization's instructions to continue.

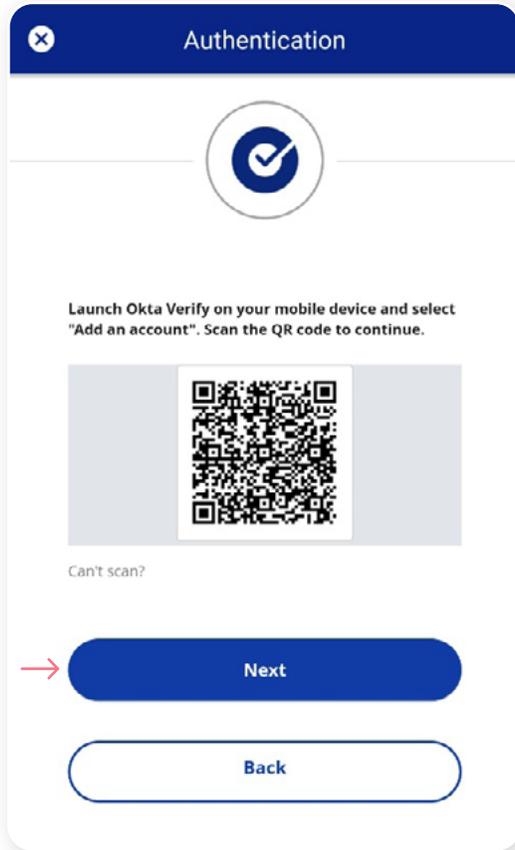
Important: Keep this app installed on your device. You'll need it to sign in.

Done

*This screen may appear differently depending on whether you are using the iOS or Android App

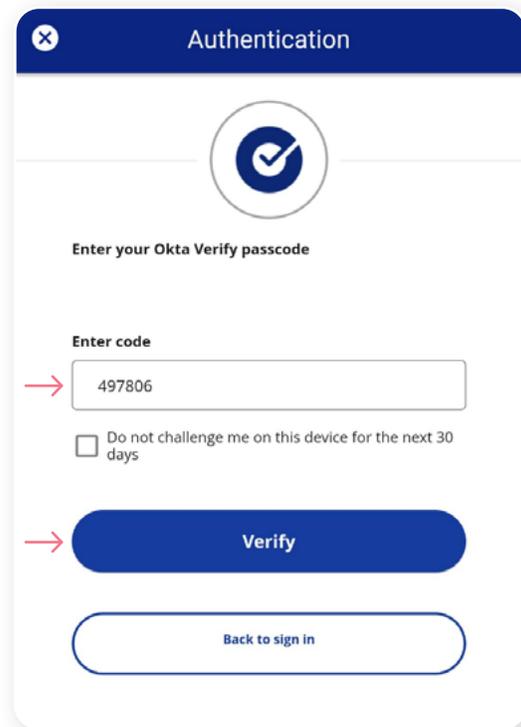
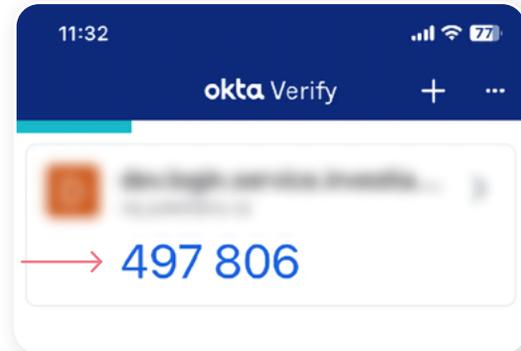
Step 7

Once you have entered the security key and setup your account in the Okta Verify app, click on **Next**.



Step 8

You will receive a temporary **6-digit code** which you will need to enter through the Authentication screen in the iA Private Wealth mobile app. Then, click **Verify**.



Step 9

You have now completed the Okta Verify set-up and will be taken back to the configuration page. You can choose to set up an additional MFA method; or click on **Finish** to continue to the iA Private Wealth mobile app.

Authentication

You can configure any additional optional factor or click on finish

Enrolled factors

- Okta Verify ✓

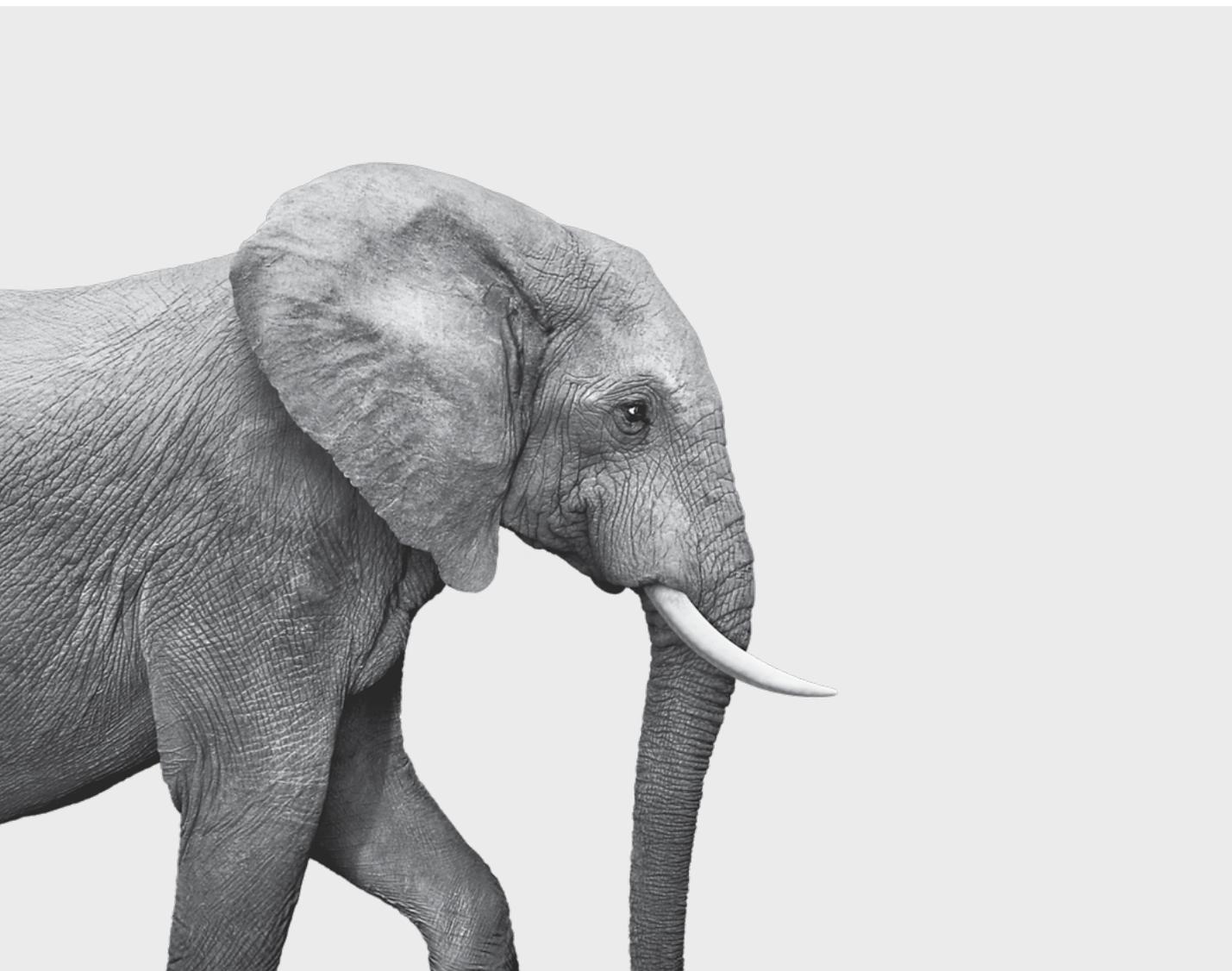
Additional optional factors

- Google Authenticator
Use the mobile app to sign in.
Choose
- SMS Authentication
Enter a single-use code sent to your mobile phone.
Choose
- Voice Call Authentication
Use a phone to sign in by following the voice instructions.
Choose

Finish



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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