



Wealth  
Management



## Helping you stay connected to your financial world

Today, more than ever, your world is online. With RBC Wealth Management Online, you can stay connected to your financial world, safely from home, or wherever it's convenient for you.

With RBC Wealth Management Online, it's easy to keep track of your investments from any device you use – mobile, tablet or desktop. You can view and save your eDocuments, make real-time fund transfers, communicate securely with us, view RBC market reports, and more.

And if you ever have any questions about using RBC Wealth Management Online, we're here to help. Click on the "Show Me How" button at the top right of every page to take interactive tours, or contact us.

### What you can expect – it all starts with our commitment to your security

- Highest possible standards for your online security
- Advanced technology and rigorous security practices to prevent unauthorized access, disclosure, alteration or misuse
- 24/7 access from any Internet-enabled device
- Consolidated view of your account balances, individual holdings, current market value, recent transactions and performance information
- Access to RBC Wealth Management Online via RBC Online Banking if you're an RBC Royal Bank client
- Interactive online tours to help you navigate the site and answer your questions
- Ability to make real-time fund transfers into your RBC Wealth Management accounts from your RBC bank accounts
- Access to a wealth of market-related information, including real-time quotes, market news, customized Watchlists, as well as RBC global market and economic reports
- Access to important RBC Wealth Management documents, which are archived online for seven years.
- Ability to communicate and share documents with us securely
- Personalization features, including customizing the data columns you see, managing email notifications, and creating account nicknames and groups



TreeCanada

Right now, when you switch to paperless “eDocuments” via RBC Wealth Management Online we will plant a tree in your honour through our partnership with Tree Canada.

## Your RBC Wealth Management Online Homepage

The screenshot shows the RBC Wealth Management Online Homepage. The interface includes a navigation menu on the left, a main dashboard with key portfolio metrics, and a detailed account summary table. Numbered callouts (1-11) point to various features: 1. Home Page navigation; 2. Summary dashboard; 3. Flexible data columns; 4. Documents section; 5. Profile settings; 6. User profile; 7. Account nicknames; 8. Account Group selection; 9. Search bar; 10. Show Me How button; 11. View My Positions button.

Currency	Cash	Investments	Total Value	\$ Unrealized Gain/Loss	% Unrealized Gain/Loss	Statements
55555555 - John's Investment Account						
CAD	-820,699.85	38.38	-820,661.47	-	-	
55555555 - John's LIRA						
CAD	305,476,802.47	8,896,520,968.36	9,201,997,770.83	+29,782,914.10	+1,470.22%	
55555555 - John's TFSA						
CAD	-164,457,807.33	1,751,067.05	-162,706,740.28	+1,691,091.53	+607.69%	
55555555 - John & Lara Joint Account						
CAD	2,199,110.10	42,468,082.09	44,667,192.19	+34,796,773.38	+9,816.51%	
55555555 - Lara's RIF						
CAD	21,450,359.77	4,235,322.53	25,685,682.30	+11.08	+11.08%	

- Find what you are looking for with simplified navigation (1)
- See important information at a glance on the homepage dashboard and drill down to see more details (2)
- Choose what you want to see using the flexible data columns (3)
- Access your eDocuments, including account statements and tax slips (4)
- Quickly update your Profile information or submit a request to change the address or phone numbers you have on file with us (5)
- Choose your email notification and document delivery preferences (6)
- Give Nicknames to your accounts to make them easily identifiable (7)
- See at-a-glance information about the balances in your Accounts or Account Groups (8)
- View detailed quotes by entering a security symbol or description (9)
- Take interactive online tours of your Homepage, Holdings and Settings by selecting the “Show Me How” button (10)
- Quickly view your individual holdings by clicking on the “View My Positions” button (11)

### Link up with RBC Online Banking

For greater convenience, link your RBC Wealth Management accounts with your other RBC accounts, including RBC Online Banking, to see all of your RBC accounts together. You can also toggle between RBC lines of business without having to sign in with a different client card number.

## Transfer funds in real time

The screenshot shows a 'Make a Transfer' form with the following fields and options:

- From Account:** 5501242-Bank-CAD
- To Account:** 41695891-Cash-CAD
- Amount:** \$ 10,000.00
- Frequency:** Once

Additional text on the form includes: 'If you request to transfer funds between 4:30 a.m. ET and 7:45 p.m. ET, your balance will be updated immediately. Transfer requests made after 7:45 p.m. ET will be available in your account the following day.' and 'Transfers may require more processing time depending on account type, amount, and availability of funds. Please check the Transfer History page once you have completed your request.'

A 'Continue' button is located at the bottom right of the form.

Transfer funds into your RBC Wealth Management accounts from any RBC Royal Bank account that is connected to your RBC client card. During regular business hours, the transfer will occur within seconds. And it's as easy as having a banking relationship with RBC Royal Bank and linking up your RBC Wealth Management Online access to RBC Online Banking. Ask us for more information.

## Send messages securely to us

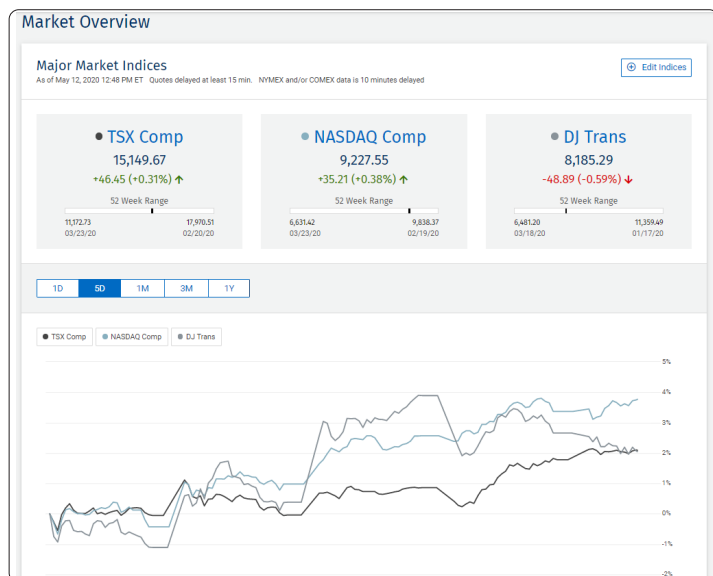
The screenshot shows the 'Messages' interface with a 'New Message' modal open. The modal includes:

- To:** A dropdown menu with 'Select' and a list of recipients: RBC Royal Bank, RBC Dominion Securities, RBC Wealth Management, RBC Direct Investing, Your Team, and ALL.
- Buttons:** Cancel, Save as Draft, and Send.
- Attachments:** A section with a 'Select File From Your Device' button and a 'drag & drop a document here' area. Below this, it lists supported file types: .jpg, .png, .gif, .doc, .docx, .xls, .xlsx, .ppt, .pptx, .pdf, .zip.

The background shows a list of messages with columns for Date and Type (all listed as 'General Message').

Need to send us some important documents or sensitive information? Use the Messages feature to communicate securely with us, attach documents and access a three-year archive. Simply select "Your Team" and compose your message to us.

## Your personal online market connection



Access detailed quotes for stocks and options listed on Canadian and U.S. markets – plus daily closing prices for mutual funds.

The Markets and Research section gives you access to a wealth of research, news and market information, including:

- A quick look at the major market indexes
- The biggest gainers and losers
- In-depth market news including breaking news, top stories and what’s making headlines
- Top RBC research and analysis reports such as the morning market commentary, investment outlook and more

## Enrol now by following these easy steps

With your RBC client card number in hand, go to [www.rbc.com](http://www.rbc.com) and click on the “Sign in” link at the top right. Then click on the “Enrol for online access” link on the Sign in page.

To get set up with online access, you’ll need your:

- Postal code
- Date of birth
- RBC Wealth Management account number
- PCD number (please contact us for this number which is unique to you)

Next, follow the few easy steps to enrol online. If you need help, check out our step-by-step guide, “Signing in for the first time,” at: [www.rbc.com/en/online-how-to-guides](http://www.rbc.com/en/online-how-to-guides). Alternatively, you can contact us directly to help set you up.

Questions? We’re here to help – contact us.

