

# Electronic Delivery of Documents



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## eTax

Starting in January 2019, clients will have the ability to download their tax documents electronically (eTax) via DS online. This includes tax forms, slips, receipts and other documentation (including T3, T5, RRSP contribution receipts, T1135 Foreign Income verification statements, etc.) that RBC Dominion Securities is required to send to clients under applicable tax legislation. Please note that US tax documents, RRIF evaluation letters and third party T3 which includes RBC Mutual Funds will not be available online and will continue to be delivered by regular postage mail.

In order to comply with tax law and the Canada Revenue Agency (CRA), clients are required to provide us with expressed consent in writing to enroll in eTax. This requirement only applies to eTax documents and does not apply to other eDocuments such as account statements, confirmations or CRM2 statements. Written consent can be provided via Secure Two Way messaging or receipt of the Individual Consent Form which we will send to you.

Clients can also switch themselves to eTax via DS online under the View and Manage Documents tab. On October 19<sup>th</sup>, existing online clients will receive a prompt on DS Online to sign up for electronic tax statement delivery:

### Important information

#### Electronic tax statement delivery now available

You can now choose to receive your RBC Dominion Securities tax documents electronically in PDF format as soon as they become available, instead of waiting for paper copies to arrive in the mail.

When you have selected electronic delivery, you will be notified by email and/or in your Secure Message Centre when your documents are available to securely view and download on DS Online. You will have access to an archive of tax documents beginning in 2019.

To switch to electronic delivery, simply follow the link below. Select the "All Electronic" button to begin receiving all of your documents electronically. You can also use the drop-down menu next to each type of document (tax documents, account statements or regulatory documents) to choose electronic or paper delivery.

[Remind me later](#)

[Don't show this again](#)

[Go to View & Manage Documents](#)



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For privacy reasons, Trading Authorities or Interested Parties will not be granted access to view electronic tax documents for personal or non-individual accounts and will continue to receive paper copies. Only Applicants, Executors, Trustees, Power of Attorneys and Signing Officers will have access to eTax.

### Switching to eDelivery

Along with accessing tax forms through DS online, clients might also consider switching all other documentation such as statements, confirmations and CRM2 statements to eDelivery. Therefore, all official RBC Dominion Securities account documents that you receive in the mail can be received online thereby avoiding mail delays and reducing paperwork.

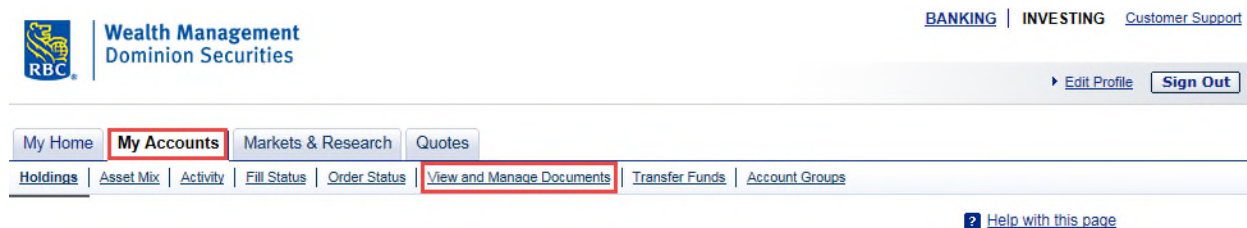
Because DS Online is accessible anytime, anywhere, you receive your documents faster and don't have to worry about lost documents in the mail. In addition, you can save your eDocuments to your personal computer and print them off whenever you need them.

With eDocuments, there is no more filing and no more hunting through old files to retrieve past documents. You will also have convenient access to a seven-year archive of past documents.

Unlike paper documents, which can be lost or damaged in the mail, your eDocuments are protected by your confidential password and the latest encryption technology.

Personal accounts can be switched simply by giving us a call and we will switch your accounts to eDocuments over the phone in minutes. Requests to switch for non-personal accounts (Corporation, Estate and Trusts) must be accompanied by a consent form that we will provide to you.

Client can also make the switch to personal accounts themselves from the "My Home" page, select "My Accounts" tab and then "View and Manage Documents."



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You will then be presented with a quick overview page that displays your delivery options for each of your accounts.

**View and Manage Documents**

[View eDocuments](#) [Manage Documents](#) [Document Options FAQs](#)

**Manage Documents**  
The table shows your document options for each of your accounts. You can change all of your options to electronic or make individual selections in the Change Document Option column.

Account	Document Type	Date of Last Change	Document Option	Change Document Option
30000000 RBC Dominion Securities	Statements	Jul 25, 2011	Paper	<a href="#">All Electronic</a>
48888888 RBC Dominion Securities	Statements	Jul 25, 2011	Paper	Select...
40500000 RBC Dominion Securities	Statements	Jul 25, 2011	Paper	Select...

[Cancel](#) [Continue >](#)

To switch all your documents to electronic delivery, simply click on the "All Electronic" button. Alternatively, you can pick and choose the delivery options for each document type and/or account. Once you've selected the options, click on "Continue".

#### View and Manage Documents

[View eDocuments](#) [Manage Documents](#) [Document Options FAQs](#)

**Manage Documents**  
The table shows your document options for each of your accounts. You can change all of your options to electronic or make individual selections in the Change Document Option column.

Account	Document Type	Date of Last Change	Document Option	Change Document Option
30000000 RBC Dominion Securities	Confirmations & Regulatory Documents	N/A	Paper	<a href="#">All Electronic</a>
	Statements & Annual Reports	N/A	Paper	N/A
48888888 RBC Dominion Securities	Confirmations & Regulatory Documents	Nov 13, 2017	Electronic	Select...
	Statements & Annual Reports	Nov 13, 2017	Electronic	Select... Electronic Paper
40500000 RBC Dominion Securities	Confirmations & Regulatory Documents	N/A	N/A	N/A
	Statements & Annual Reports	N/A	N/A	N/A

[Clear](#) [Continue >](#)

You will then be presented with the terms and conditions. Tick the acknowledgement box and hit "submit." Your documents will now be switched to eDelivery.

We would be happy to assist you in setting up your accounts for electronic delivery. If you would like more information, or assistance signing up for eDocuments, please contact us.

This information is not investment advice and should be used only in conjunction with a discussion with your RBC Dominion Securities Inc. Investment Advisor. This will ensure that your own circumstances have been considered properly and that action is taken on the latest available information. The information contained herein has been obtained from sources believed to be reliable at the time obtained but neither RBC Dominion Securities Inc. nor its employees, agents, or information suppliers can guarantee its accuracy or completeness. This report is not and under no circumstances is to be construed as an offer to sell or the solicitation of an offer to buy any securities. This report is furnished on the basis and understanding that neither RBC Dominion Securities Inc. nor its employees, agents, or information suppliers is to be under any responsibility or liability whatsoever in respect thereof. The inventories of RBC Dominion Securities Inc. may from time to time include securities mentioned herein. RBC Dominion Securities Inc.\* and Royal Bank of Canada are separate corporate entities which are affiliated. \*Member-Canadian Investor Protection Fund. RBC Dominion Securities Inc. is a member company of RBC Wealth Management, a business segment of Royal Bank of Canada. ® Registered trademarks of Royal Bank of Canada. Used under licence. © RBC Dominion Securities Inc. 2015. All rights reserved.



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