



Wealth
Management



RBC Wealth Management Online

Questions? We're here to help – contact our Helpdesk at 1-888-820-8006, or contact your Investment Advisor team.

View your consolidated portfolio reviews quickly and easily

eDocuments make it easy to reduce your paperwork and safely view your portfolio reviews for all of your RBC Wealth Management accounts – consolidated at a household level. From the convenience of your computer, tablet or smartphone, you can view, save and print your documents as PDF files, which means no more filing – and no more hunting through old files to retrieve past documents.

You'll also have quick access to a seven-year archive of your consolidated portfolio reviews starting from June 2020. Plus, you can view all of your other eDocuments, including account statements and tax slips.

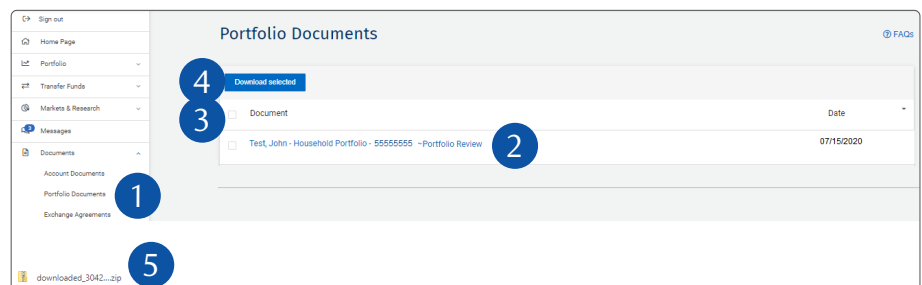
Here's how:

1. Go to www.rbclds.com, and “Sign in” (top right corner) using your 16-digit client card number and password. If you don't know your client card number, contact your Investment Advisor team.
2. Click “Documents” and “Portfolio Documents” (1) on the left-hand navigation.

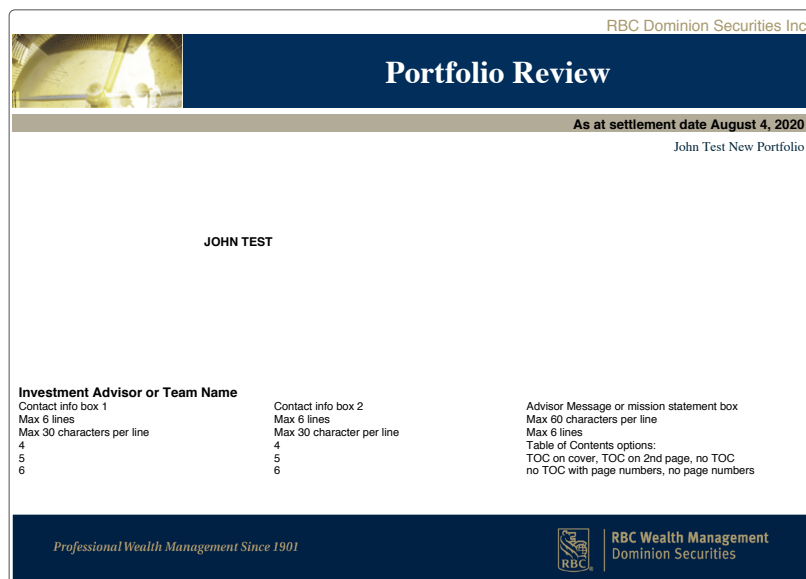
Next, select an individual portfolio review name (2) you wish to download.

Or, select Document (3) to download all portfolio reviews and then “Download selected” (4). You will see a folder containing your portfolio reviews at the bottom left hand corner of your screen (5).

The documents are in Adobe PDF format, so you will need Adobe Reader to view them. If you don't have it already, you can download it for free at: <https://acrobat.adobe.com/ca/en/acrobat/pdf-reader.html>.



3. You may choose to save the PDF on your personal computer or print a copy for your records.



Frequently asked questions

Are eDocuments complimentary?

Yes.

Can I switch back to paper portfolio reviews?

Please contact your Investment Advisor team and they will be pleased to assist.

Can I also receive tax documents as eDocuments?

Yes, you can now receive many tax documents electronically. Because they're a newer feature, tax eDocuments are available from 2018 onwards in your archive. To switch to electronic tax slips, please contact your Investment Advisor team, or visit www.rbc.com/en/online-how-to-guides and view the how-to guide if you wish to do it yourself online.

The seven-year archive is handy but what if I want to save my documents for longer?

Simply save the documents you want to your computer, or print them if you wish.

Adobe Reader is great, but what if I want to add encryption or password-protection to my PDFs?

For this added security, you can purchase Adobe Acrobat from www.adobe.com.

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