



Wealth Management Accounts Linking Guide

Effective October 15th, your wealth management accounts can now be linked to your digital banking. This enhancement will provide our members with the added convenience of viewing their wealth management accounts directly from the digital banking platform, without having to login through a separate website.

How do I add my wealth management account from internet banking?

1. Login to digital banking
2. Select Accounts > Wealth management accounts
3. Click the Link Account button
4. Select the applicable wealth product:
 - a. Aviso Wealth
 - b. Qtrade Investor
 - c. Qtrade Guided Portfolios
5. Enter the following mandatory details:
 - a. Client number – found on your statement
 - b. Last name
 - c. Postal code – must match the wealth management file information
 - d. Date of birth – this is automatically populated from the banking system

Client ID

You can find your client ID # on your statement.



700 - 1111 West Georgia Street
Vancouver BC V6E 4T6

JANE DOE
1212 MAIN STREET
ANYWHEREVILLE ON M1M2B2

Statement of Account For the period ending March 31, 2024

Your Advisory Team

Investment Advisor
Sarah Singh

416.666.1212

csupport@aviso.com

Client ID # 2A1234

123412348765

Client ID can be found on the
first page of your statement

Aviso Wealth is the new Credential Securities!
Please see the insert at the end of this statement for important
information about our dealer merger and rebrand, and more.

700-1111 West Georgia Street
Vancouver BC
V6E 4T6
(855) 714-3800

6. Confirm the details of the information entered

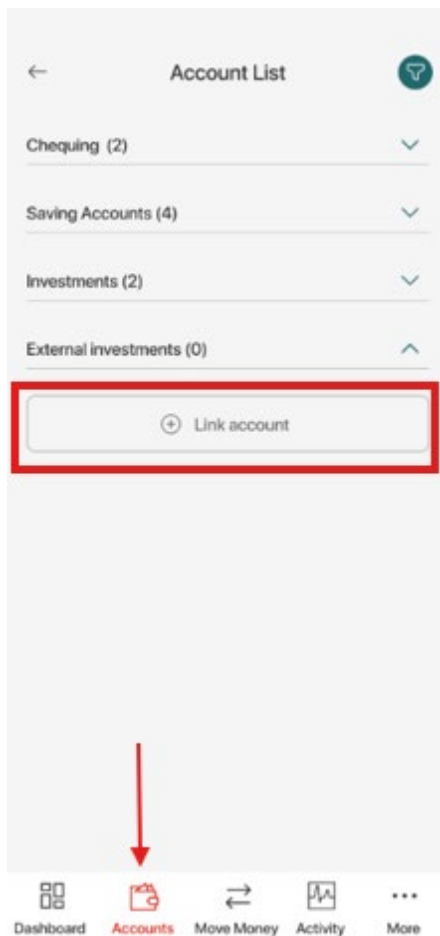


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7. Click Confirm
8. Enter the one-time password (OTP)
9. Click Confirm
10. The wealth management account is now linked

How do I add my wealth management account from the mobile app?

1. Login to digital banking app
2. Select Accounts > Wealth management accounts
3. Click the Link Account



4. Select the applicable wealth product:
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- b. Last name
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monroef@aviso.com

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- 6. Confirm the details of the information entered
- 7. Click Confirm
- 8. Enter the one-time password (OTP)
- 9. Click Confirm
- 10. Success! The wealth management account is now linked