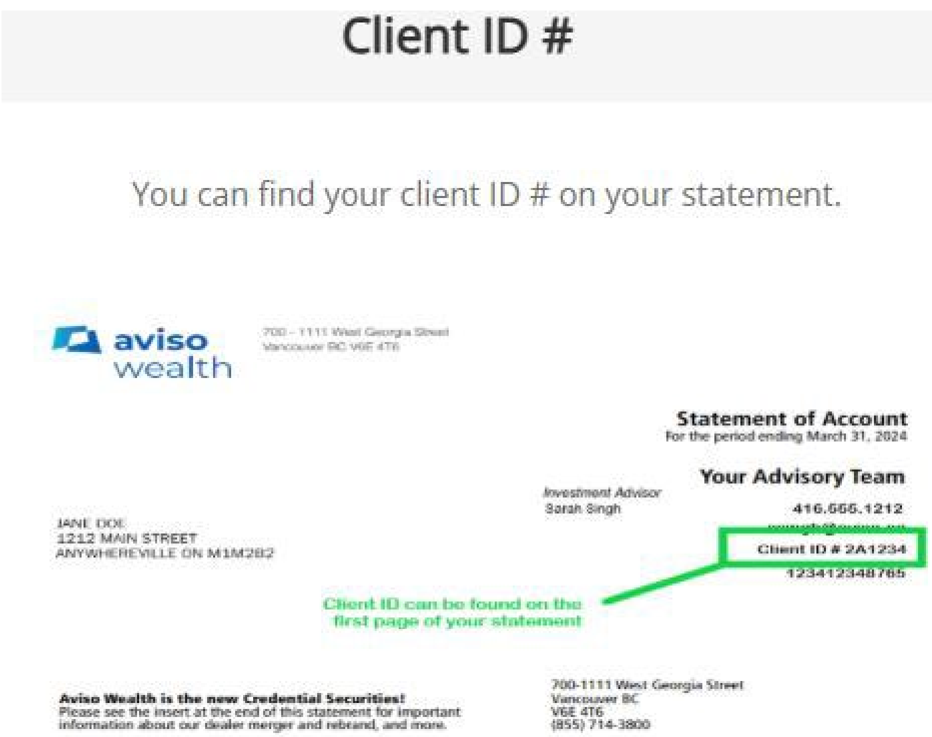
Wealth Management Accounts Linking Guide

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

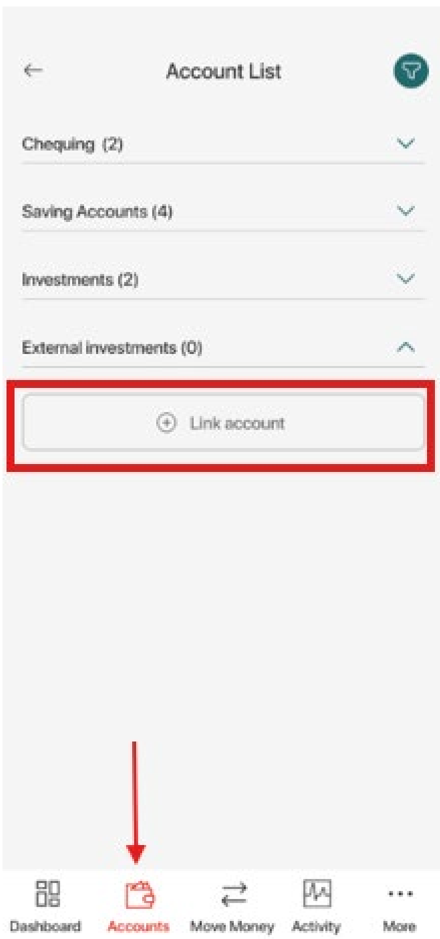


6. Confirm the details of the information entered

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



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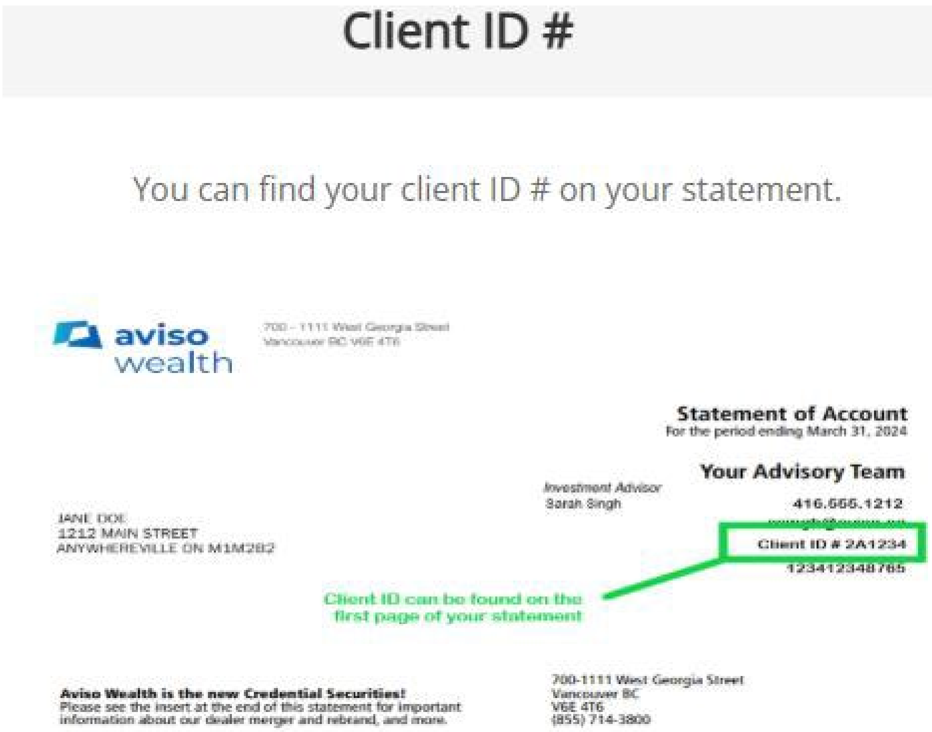

6. Confirm the details of the information entered
7. Click Confirm
8. Enter the one-time password (OTP)
9. Click Confirm
10. Success! The wealth management account is now linked