

Investor connect



Correspondent
Services

www.investor-connect.com

Get easy access to the information that matters most to you

Investor Connect[®] provides you online service that gives you easy, secure access to your account information wherever you have internet access, including your smartphone.

Additionally, the mobile app is now available to download for free on your iPhone[®], iPad[®] or Android[™] device.

Know where you stand — every day

Your current positions are updated as they change throughout the day,¹ so you'll find it easy to stay up-to-date with all of your accounts. Having access to this information means being able to make smart, informed decisions and work more closely and efficiently with your financial advisor to achieve your goals.

Now available: Mobile app

A new mobile app has been designed to provide you with freedom, flexibility and secure on-the-go access to information and tools that may help enhance your client experience. Available for your iPhone, iPad or Android device, the RBC Connect app is free on the App Store[®] or Google Play[™]. The app also allows you to view your accounts and access market data.

View your financial information with greater control

Here are some of the types of information you can access and some powerful tools you'll have at your fingertips.

Account information²

- Holdings, including cost basis
- Transaction details
- Gain/loss information
- Year-to-date income
- Cash and money market balances
- Open orders
- A visual "heat map" of your Equity and Mutual Fund holdings

Online documents

Access a full archive of your financial documents going back several months, even years, for most types of documents.

- Account statements
- Trade and non-trade confirmations
- Tax documents
- Proxies and reorganization notices
- Mutual fund prospectuses
- Annual statements

Enjoy the benefits of paperless delivery

Instead of waiting for the mail to arrive or worrying about the risk of fraud and identity theft that may come with mailed documents, our secure website gives you the safety and simplicity of reading your documents online.

When one of your documents is available to view, we'll send you an email. Just click the link in the email, sign in to our site and view the document. It's that easy.

- **Security**—We follow rigorous security practices to help protect your information online.
- **Convenience**—View an archive of documents going back several months, even years.
- **Simplicity**—Trade your cluttered mailbox for convenient access to your important online documents. No more paper filing of documents, no more time-consuming searches for them later.
- **Environmental responsibility**—Going paperless is one of the easiest ways for us to do our part in preserving precious natural resources.

Select "Go Paperless" when you register for Investor Connect[®].

Service providers

- Download information about your transactions, balances and positions into your Intuit® Quicken® and/or TurboTax® software.
- Make well-informed budgeting decisions and simplify your tax return preparations.

Gain valuable insights and take control using the investor center

The Investor Center features tools you can use to evaluate options and choices, so you have full confidence in your investment decisions.

Markets

- Get current up-to-the-minute info about world markets, including market overviews, indices, and today's market movers
- Explore the details about companies and mutual funds that interest you
- View breaking news and insights from industry experts

Stock Watch

- Create up to 10 distinct lists and decide which symbols you'd like to track.
- In one table, you'll see a snapshot for each symbol with volume, EPS, P/E ratio and 52-week range.

Hypothetical holdings

- Sharpen your investment know-how by creating virtual portfolios to track market prices, values, and unrealized gain or loss info for stocks and funds you're interested in.
- Create several portfolios and even base them on your existing accounts—here or elsewhere.

Alerts

- Choose to receive email Alerts and you'll have insight into the symbols you're tracking, no matter where you are.

Calculators

- Watch the progress on reaching your goals for retirement, investments and savings, insurance, or other goals like college savings with easy-to-use calculators.

Privacy and security

We are committed to providing you with a secure online experience. Protecting your information and safeguarding you from fraud are among our highest priorities. In addition to our stringent privacy practices, we employ a diverse range of current technologies and security mechanisms to ensure the safety, confidentiality and integrity of your information and transactions.

Once registered, you can download the Connect mobile app by searching for "Connect" in the App Store (for iPhone and iPad) and Google Play (for Android).

Take a tour

If you're interested in exploring some of the convenient features available on the site, try our virtual visit. Just visit www.investor-connect.com and click "Take a Tour."

Fast and easy registration

1. Gather the account numbers you'd like to view online.
2. Go to our website at www.investor-connect.com and click "Register now."
3. Fill out the registration pages and click "Submit."
4. Access to most account types will be available immediately.³

If you need help

If you have technical or functional questions about this site, call Client Support Services, toll-free at: 1 (800) 933-9946 weekdays from 8 a.m.–10 p.m. ET and Saturday from 10 a.m. to 6 p.m. ET.

If you have any investment questions, please contact your financial advisor.

1. Market information and the value of your accounts are delayed approximately 20 minutes.

2. For complete account information, refer to your account statement(s), trade confirmation(s), and open order notice(s).

3. Based on the type of account or account ownership. Some account types may require additional validation.

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