



Wealth  
Management



## RBC Wealth Management Online

Questions? We're here to help – contact our Helpdesk at 1-866-342-3992, or contact your Investment Counselling team.

# Switch to secure electronic tax documents

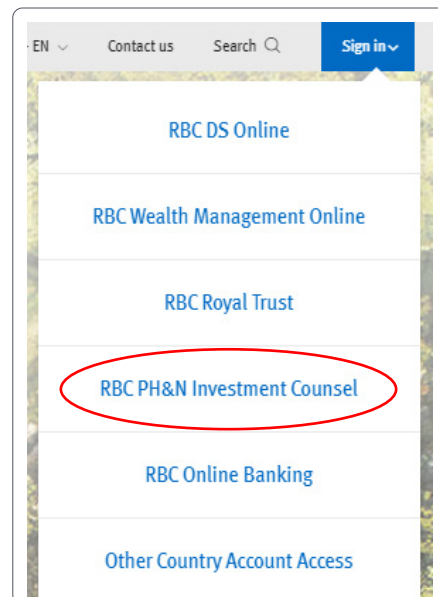
It's easy for you to access your electronic tax documents in a safe and convenient manner through RBC Wealth Management Online.

You can store your tax information securely and receive it faster, while reducing your paperwork. Plus, your tax information is kept in a protected environment for you to access at any time from the convenience of your computer, tablet or smartphone.

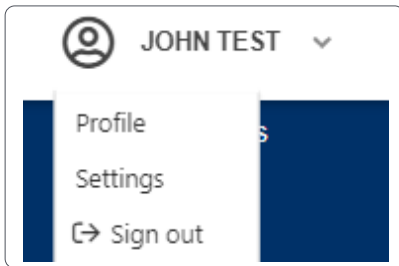
Electronic tax documents are available as of the 2018 tax year and will be archived online for seven years, provided the account remains open. As with all eDocuments, you can securely view, save and print your tax documents as Adobe PDF files and access them at any time.

## Turn on electronic tax documents in four easy steps

1. Go to [www.rbcwealthmanagement.com](http://www.rbcwealthmanagement.com), and “Sign In” to “RBC PH&N Investment Counsel” using your 16-digit client card number and password. If you don't know your client card number, contact your Investment Counselling team.



2. Once you've logged in, click on your name in the top right corner and click "Settings."

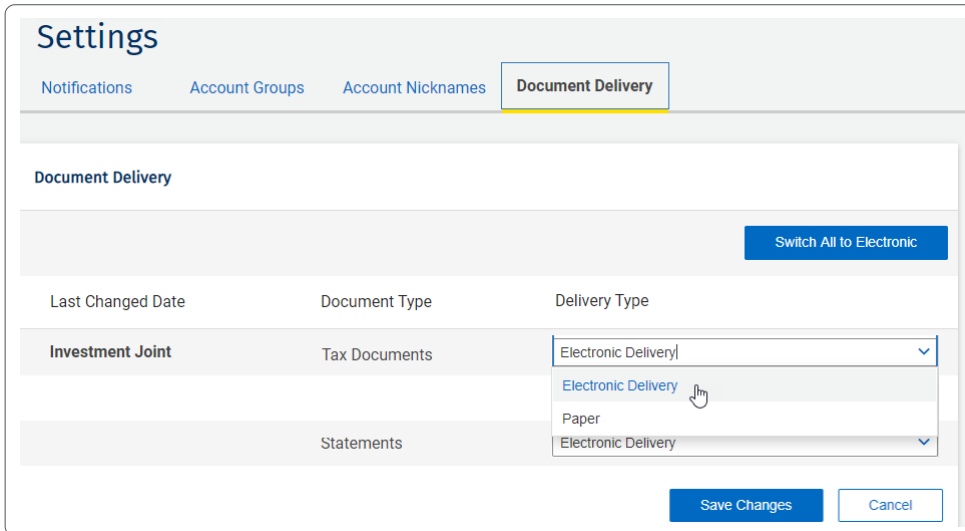


3. You can then select eDocuments on the "Document Delivery" tab. There, you'll see a list of your accounts and the delivery type for each document type.

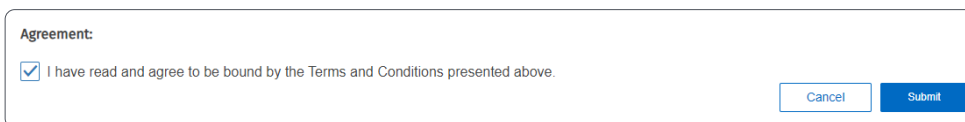
To switch everything to eDocuments, click the "Switch All to Electronic" button.

Or, click on the "Delivery Type" dropdown beside any of the document types individually and select "Electronic Delivery" as desired.

Once you've made your changes, click "Save Changes" at the bottom of the page.



4. Next, please read the important Terms and Conditions that our lawyers want you to know about. If you agree, tick the checkbox by "I have read and agree to be bound by the Terms and Conditions presented above" and click "Submit."



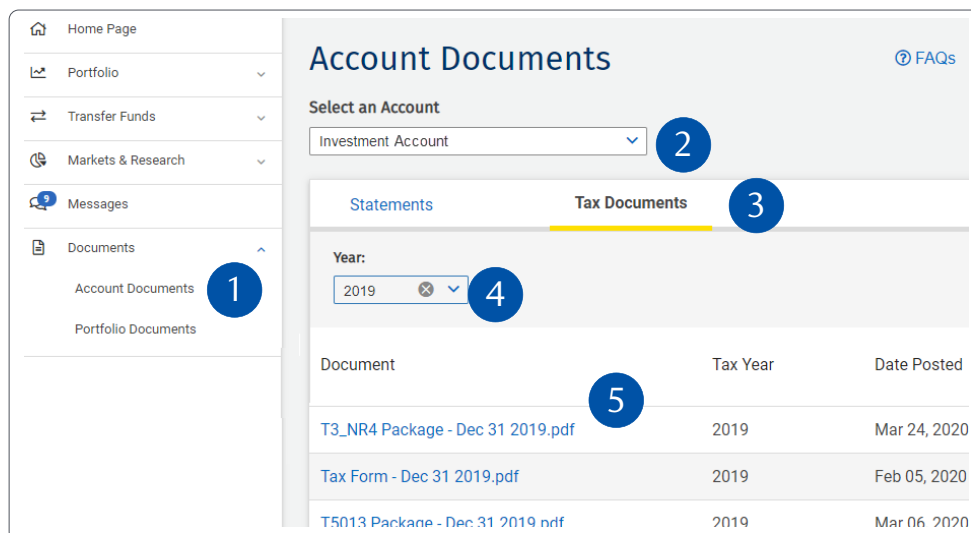
That's it! You're now ready to start viewing your electronic tax documents whenever you like.

## Here’s how to view your electronic tax documents

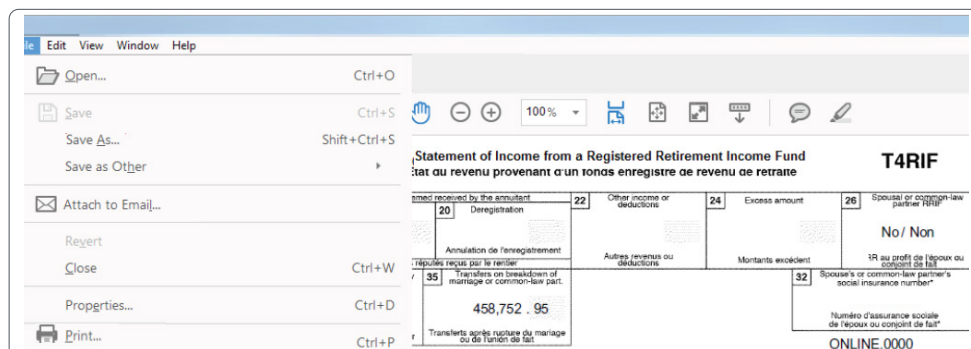
Click “Documents” and “Account Documents” (1) on the left-hand navigation.

Select an account from the dropdown menu (2), the “Tax Documents” tab (3) and then the desired year (4).

Click on any of the documents (5) you want to open.



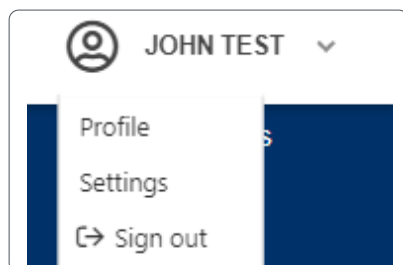
If you want, you can save or print your tax documents. They are in Adobe PDF format, so you will need Adobe Reader to view them. If you don’t have it already, you can download it for free at: <https://acrobat.adobe.com/ca/en/acrobat/pdf-reader.html>.



## Get notified when you have a new tax document

We’re happy to email you whenever you have a new eDocument, including tax documents. Here’s how:

Click on your name in the top right corner and click “Settings.”



Enter your email address (1) and click “Save Changes” (2). Make sure you **do not** tick the checkbox under eDocument Notifications (3). Then click “Save Changes” (4).

The screenshot shows the 'Settings' page with the 'Notifications' tab selected. The 'Email Address' field contains 'johnstest@email.com' and is marked with a '1'. Below it, a 'Note' section contains the text 'Please add our email address, ibanking@ib.rbc.com to your "safe senders" list. Then you can receive emails from RBC and they won't be blocked by spam filters.' and is marked with a '2'. The 'eDocument Notifications' section has a checkbox that is unchecked and is marked with a '3'. The 'Message Centre Notifications' section has a checkbox that is unchecked and is marked with a '4'. Both the 'eDocument Notifications' and 'Message Centre Notifications' sections have 'Cancel' and 'Save Changes' buttons.

You're all set! You will receive an email letting you know there's a new tax document ready.

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## Frequently asked questions

### Are electronic tax documents complimentary?

Yes, all eDocuments are complimentary.

### 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.

### What if I want to switch back to paper documents?

You can switch back any time, but remember to save or print the documents you want first, before you turn off any eDocuments including electronic tax documents.

### 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](http://www.adobe.com).

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