Royal Bank of Canada
Online Services
User Guide

Wealth Management

RBC

Version: October 2022

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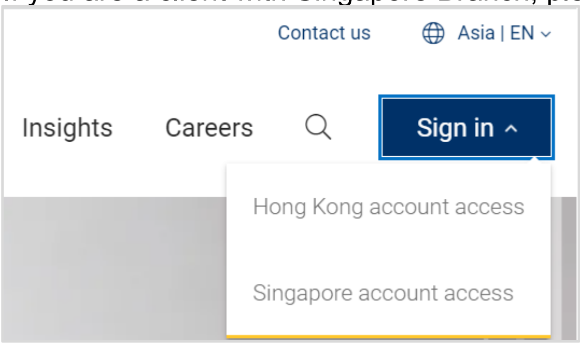
1. Login Procedure

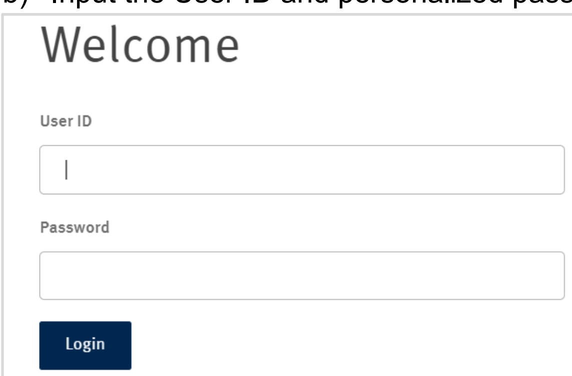
Please follow the procedures below to login.

You may access the link from https://www.rbcwealthmanagement.com/en-asia/
If you are a client with Hong Kong Branch, please select "Hong Kong account access".
If you are a client with Singapore Branch, please select "Singapore account access".

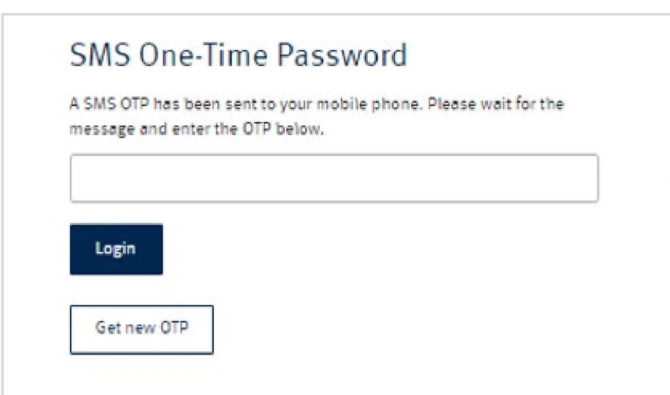


a) To log in, you will require:
- User ID (Provided in the Online Service welcome letter)
- Personalized Password (Provided in the Online Service Password letter. You are required to change this password upon first log in).
- Mobile phone with number registered to receive SMS for Online Service authentication.

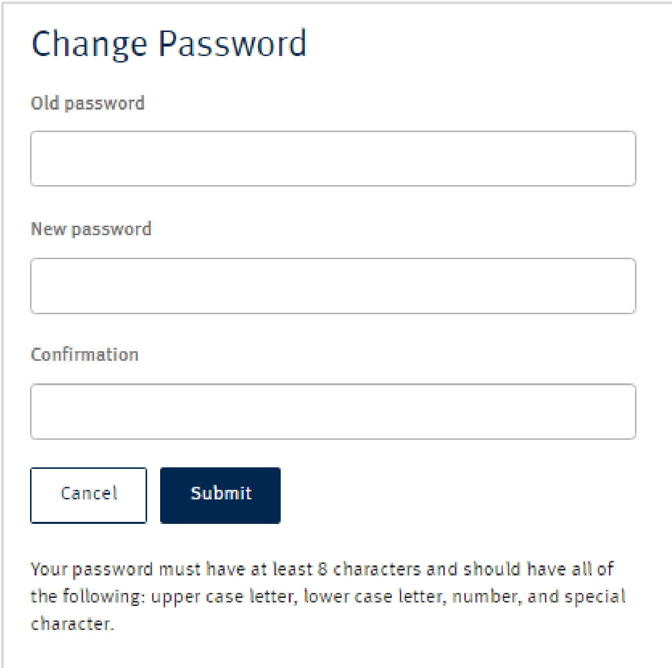
b) Input the User ID and personalized password in the screen below.



You will view the subsequent screen as follows. A one-time SMS password (OTP) will be sent to your mobile phone. You can input the SMS OTP and click **Login.**



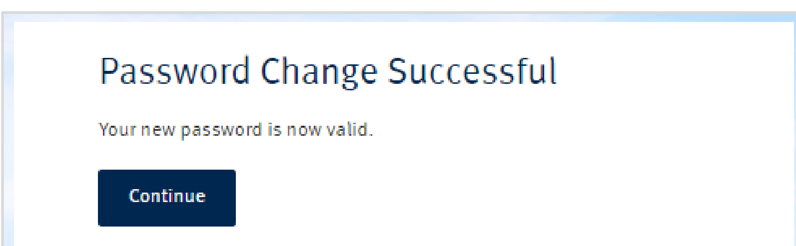
When you login with your Personalized Password for the first time, the system will prompt you to change the personalized password:



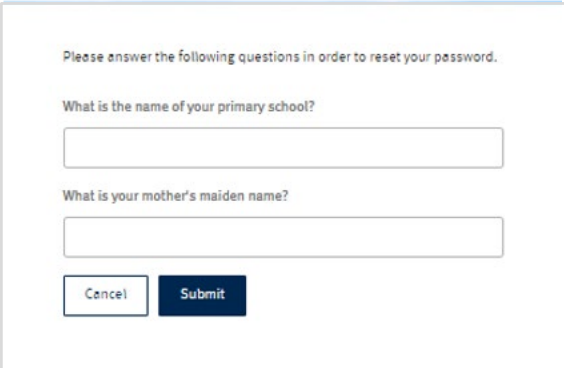
TIPS:

Password composition must comply with password policy as stated below:

1) It must be a minimum of eight (8) characters in length
2) It must include the following:
a) one upper case letter;
b) one lower case letter;
c) one number;
d) one special character; Eg: $ @ # ( ) ! % *
3) The new password cannot be the same as the previous 8 passwords.
4) It rejects passwords that are easy to decipher. (e.g. “abcde”, “1234”,“AaAaaAA”, “qwerty”)
Once your new password is saved successfully, you will view the screen as follows.



c) For first time login, you need to set up answers to your secret questions. Please note down the answers and keep them safely. These will be used to prompt you in the future if you need to reset your password online. Upon submit answer, system will direct you to the overview page.



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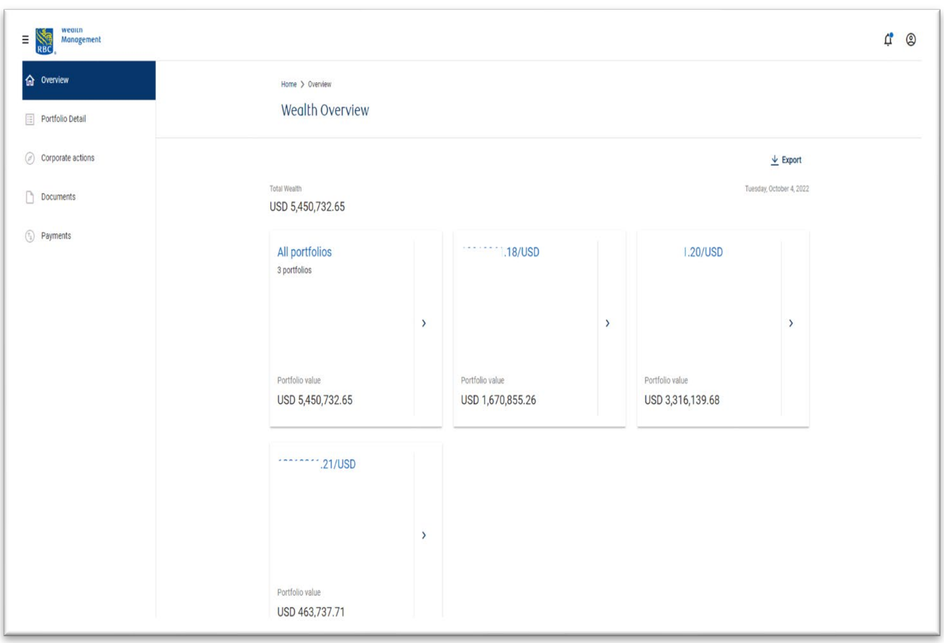
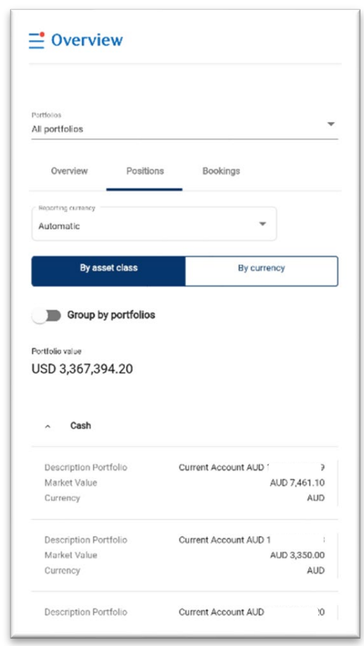
2. Login Online Service via RBC Wealth app or Web

You can login for your online service across different devices (desktops and mobile phones under Android or iOS). The pages are designed to be responsive, so as to provide you with the best view on your devices.

If you are a client with Hong Kong Branch, please use RBC Wealth HKB app
If you are a client with Singapore Branch, please use RBC Wealth SGB app





Desktop View

Mobile View

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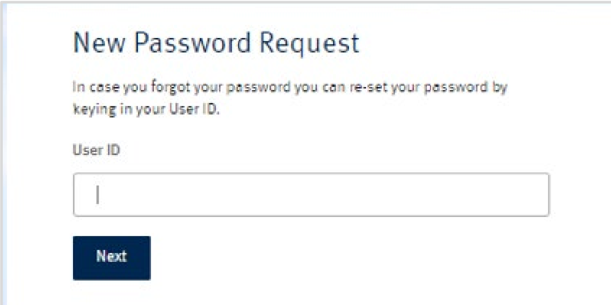
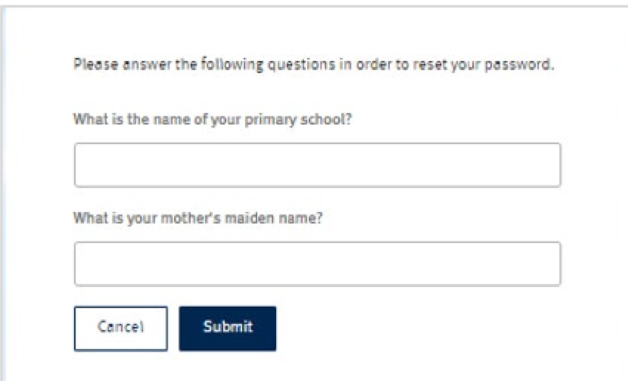
3. Forgot Password

If you forget your password, you can click **Forgot password** link on login page to reset password online.

You need to enter your user ID and click **Next** to proceed.

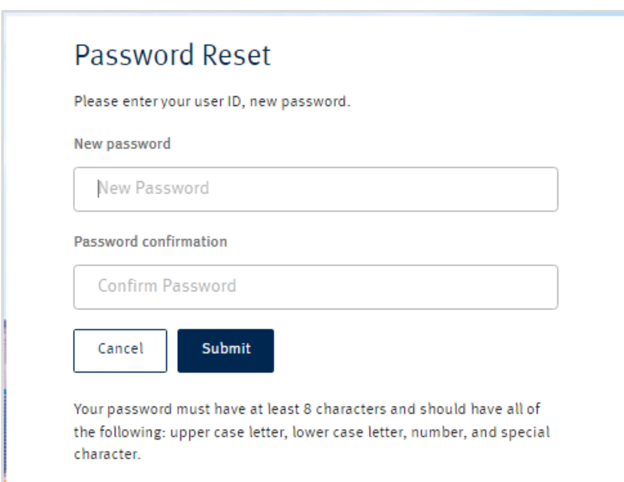


You need to provide your answers to secret questions which you have set up upon your first login. If you cannot recall your secret question answers, please contact your relationship manager to request a new password.



After you provide correct answers to your secret questions, you will view the subsequent screen as follows. A SMS one time password (OTP) will be sent to your mobile phone. You can input the SMS OTP and click **Login**.

You can set your new password in the Password Reset screen.



Once your new password saved successfully, click **Submit** to redirect to login page.

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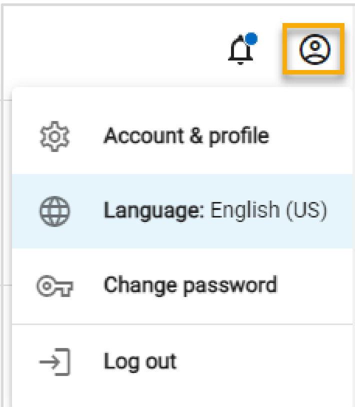
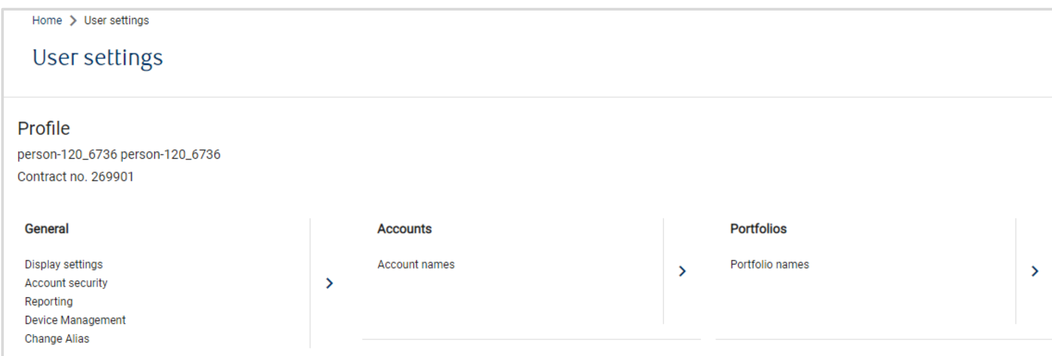
4. Settings

You can select display language, change password and Account & profile settings under the **User** icon.



You can select **Account & profile** to go to General, Accounts and Portfolio settings. You can change alias, set default display language and default reference currency under General settings. You can also set customized account names under Accounts setting or portfolio names under Portfolios settings.



Change Alias

Select **Change Alias** under section **Account & profile** to set your preferred user ID. After setting up the preferred user ID, you can log in by using either the bank's default 6 digit user ID or your preferred user ID.

Change password

Select **Change password** and the set the new password in the new prompt window. Password composition must comply with the password policy

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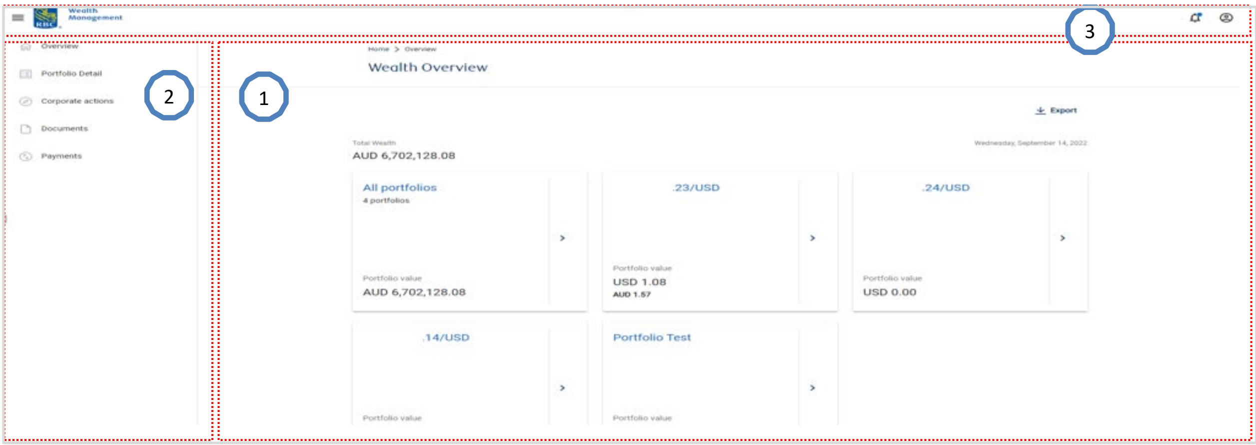
5. Menu Overview

After the login, you will be directed to Overview page.

1 You can view the wealth of all your portfolios and single portfolio. Click each single portfolio to view the details.

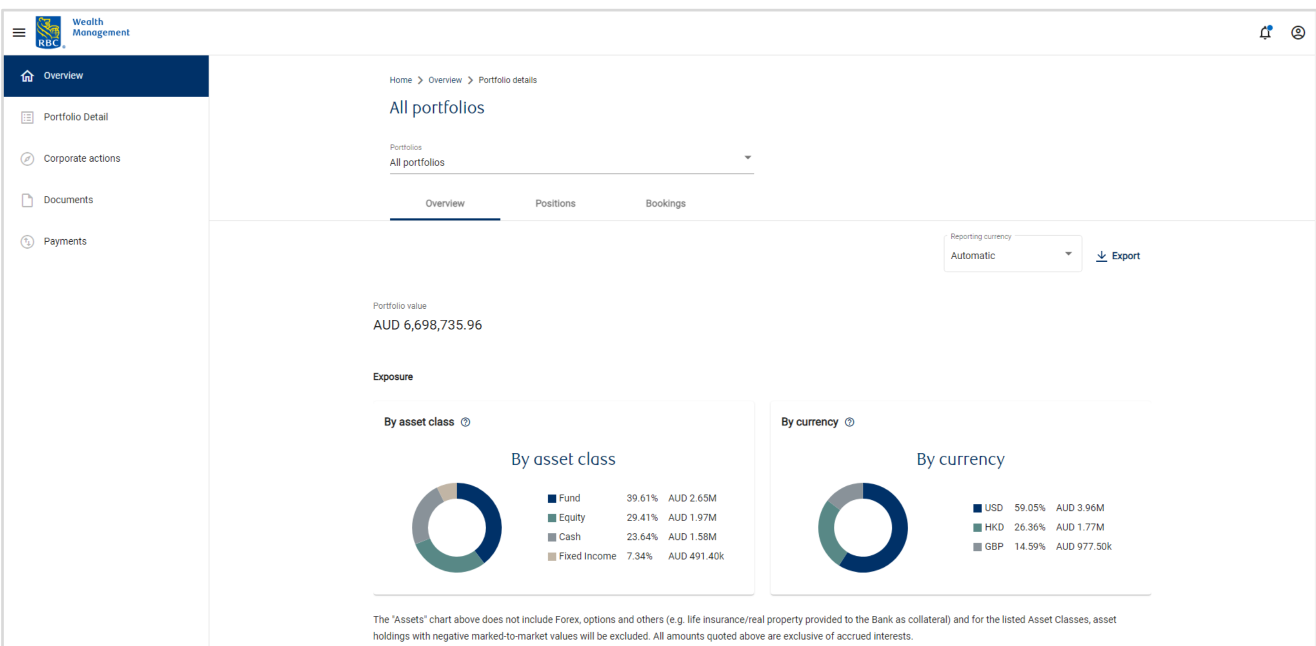
2 You can click the vertical menu to navigate to the other pages.

3 Number of unread documents shows on the Document icon on the horizontal menu. The User icon is available for you to customize your Online Service settings or change of password.



Overview

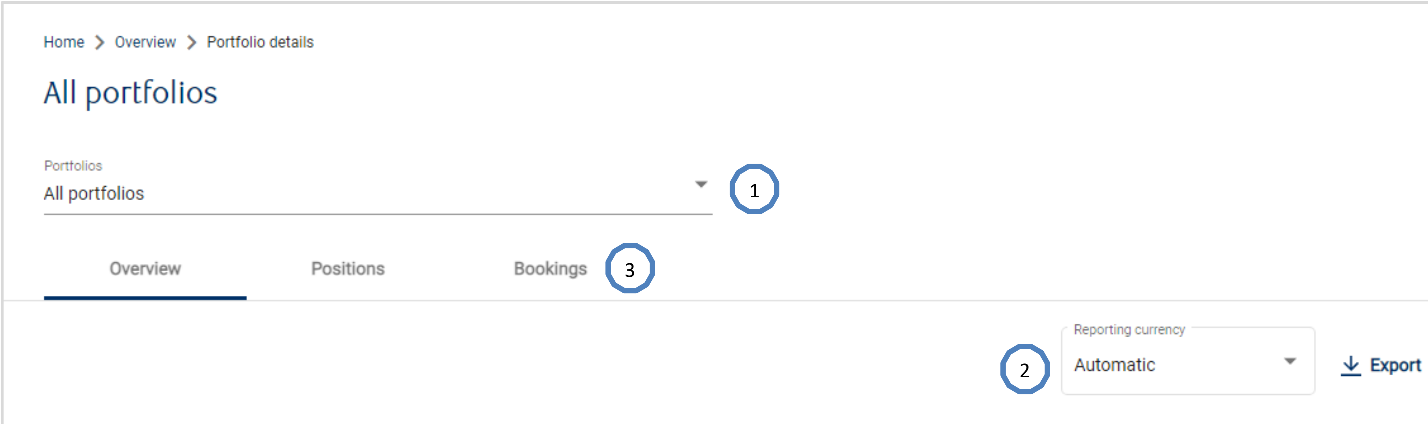
Portfolio detail page provides a summary of your single portfolio. You can view assets and liabilities allocation in graph and matrix table.



1 You can view different portfolios by selecting portfolio from the portfolio dropdown list.

2 You can also change the reporting currency in the dropdown list.

3 Click on **Positions** or **Bookings** tab in order to see portfolio positions and transactions.



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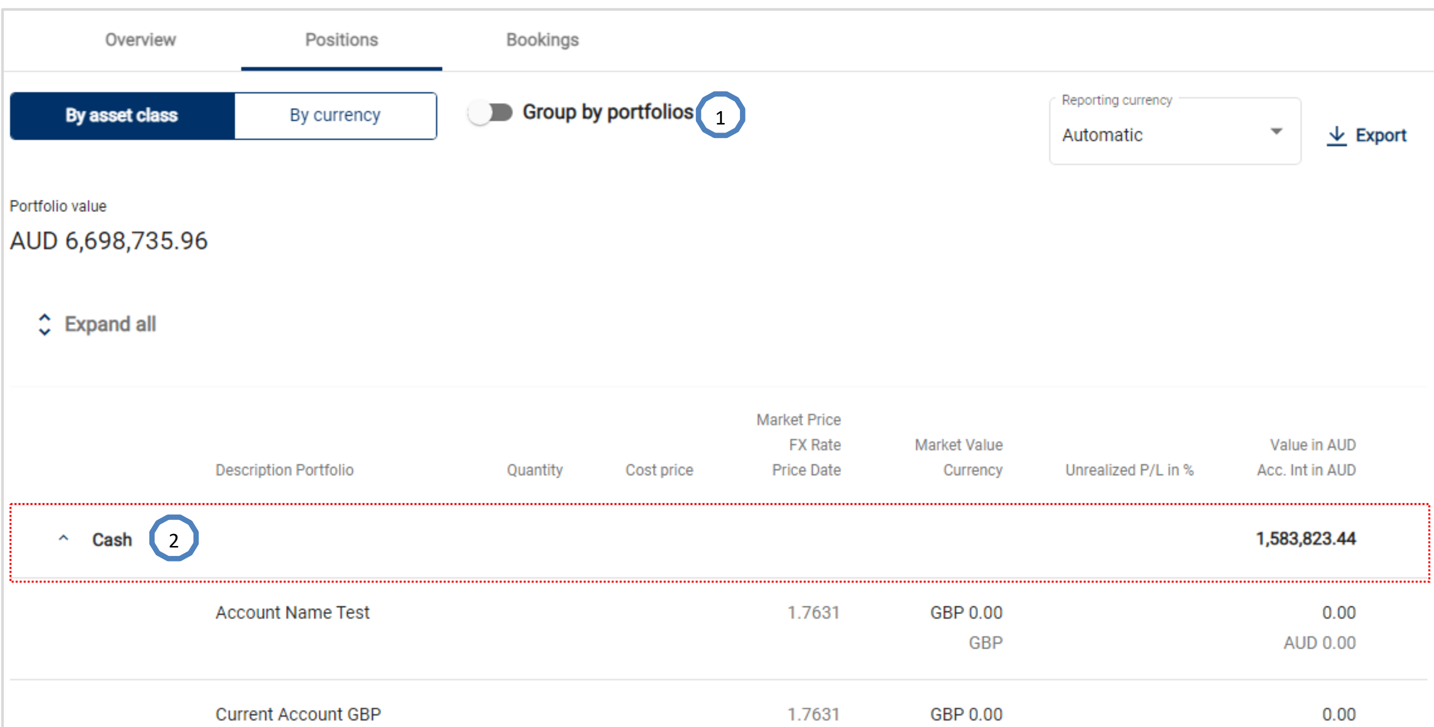
Positions

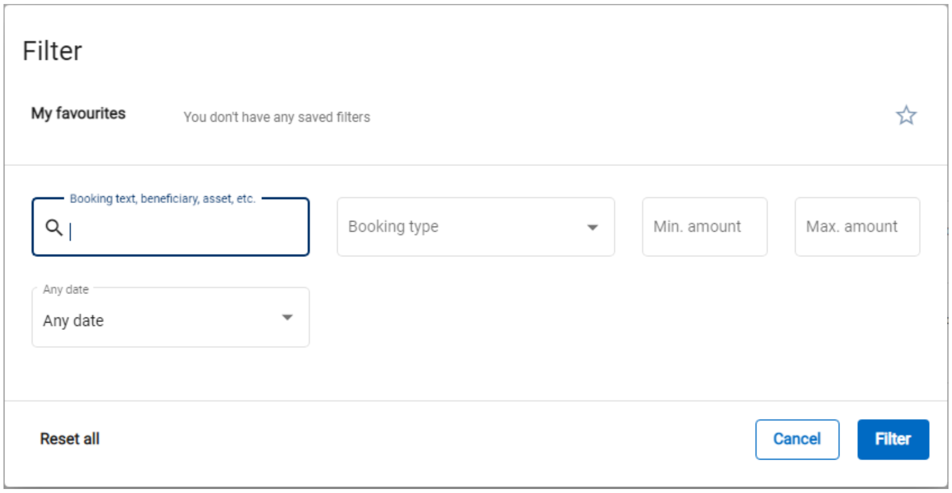
The tab **Positions** shows you position details of each single portfolio. You can see information such as Quantity, Cost Price, Market Price, FX Price, Price Date, Market Value, Currency, Unrealized P/L%, Value in Portfolio Currency and Acc. Int in Portfolio Currency.



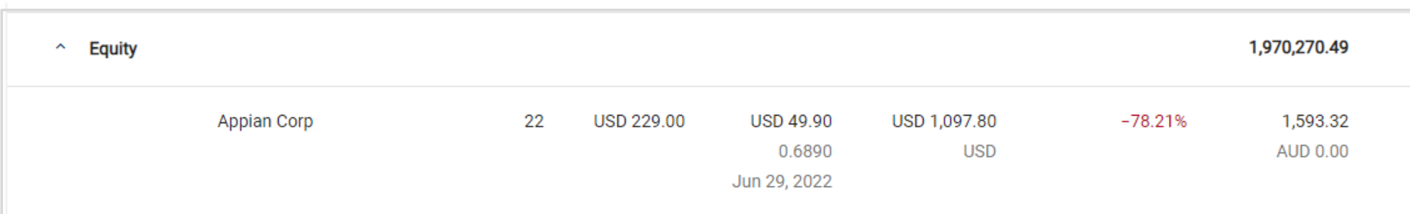
1 You can click the portfolio positions grouped by either asset class or currency.

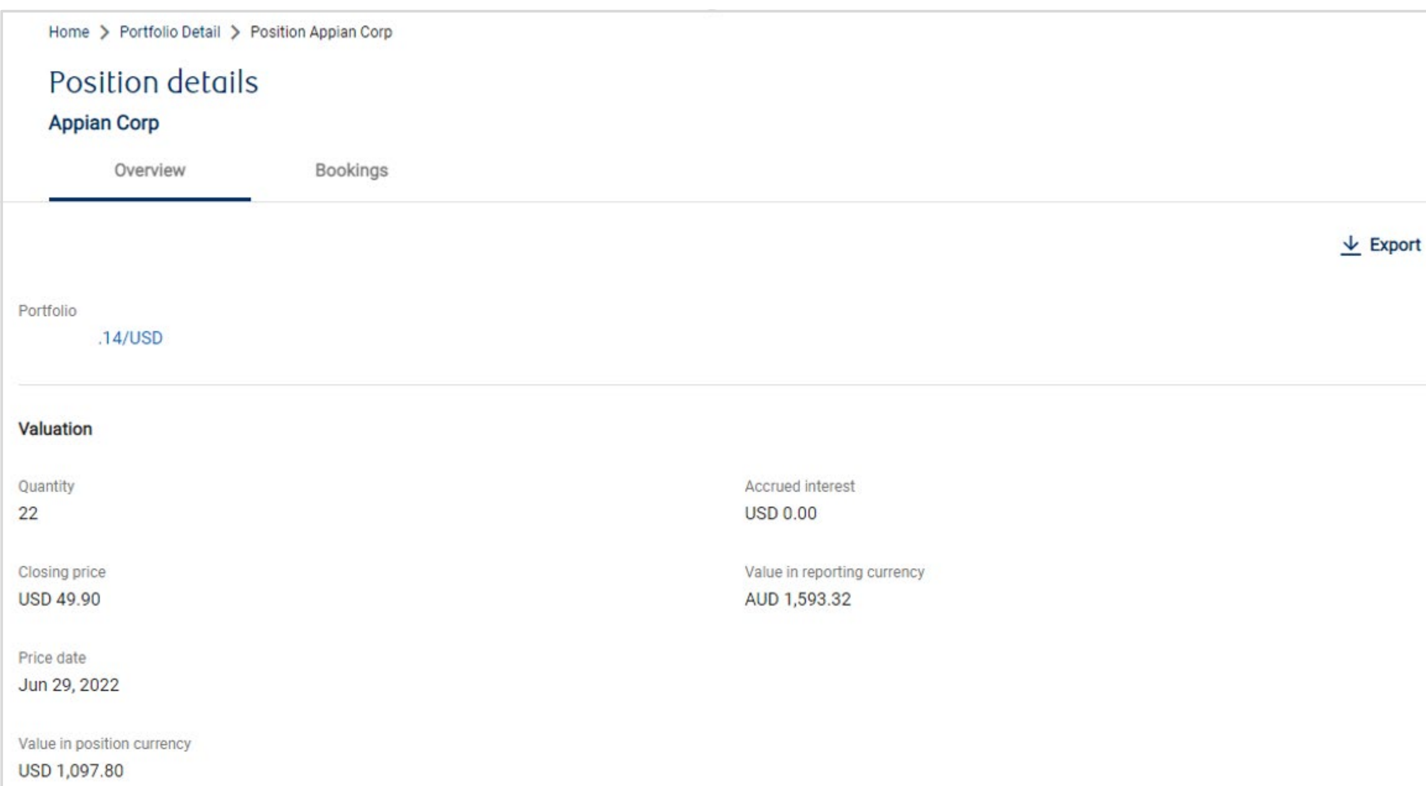
2 You can click any position line to view booking details of the selected position.

In the cash account statement page, you can click Filter to open the Filter window. You can select different time periods, Booking type, etc. and click **Filter** button to show the booking details of the selected cash account.



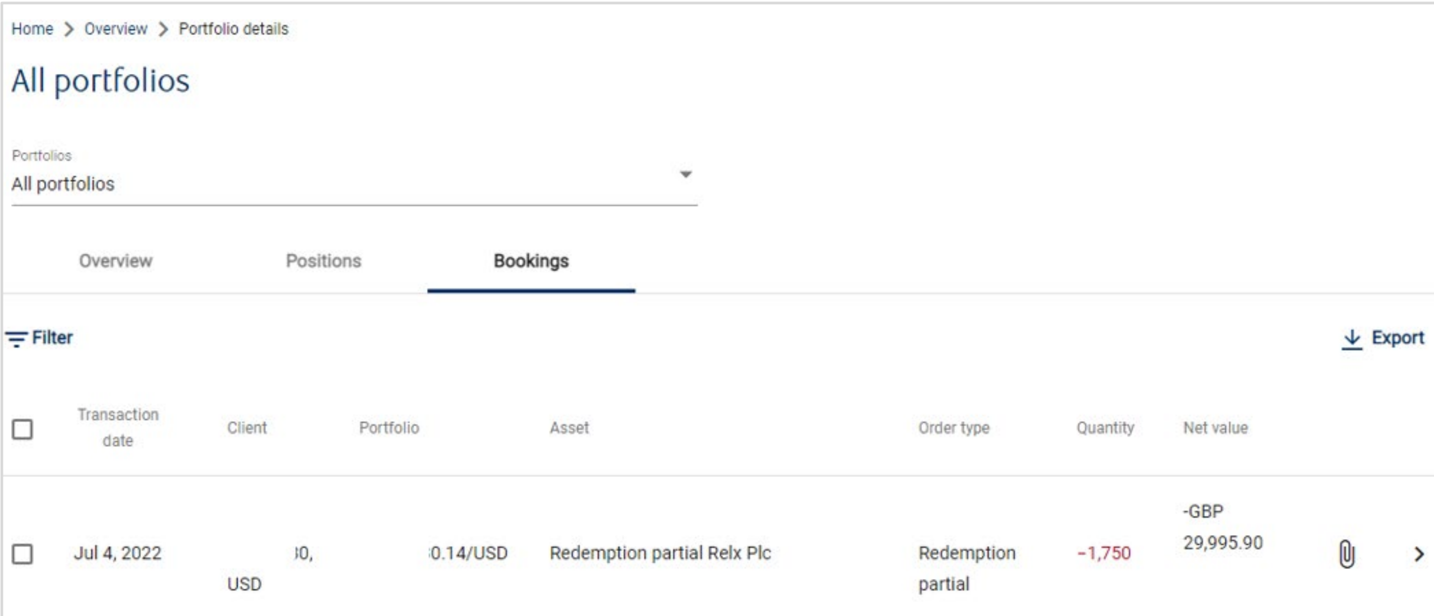
In the non cash account booking page, you can also select different time periods and click **Filter** button to show booking details of the selected position. You can show Position Details page by clicking the selected position under the non cash account.



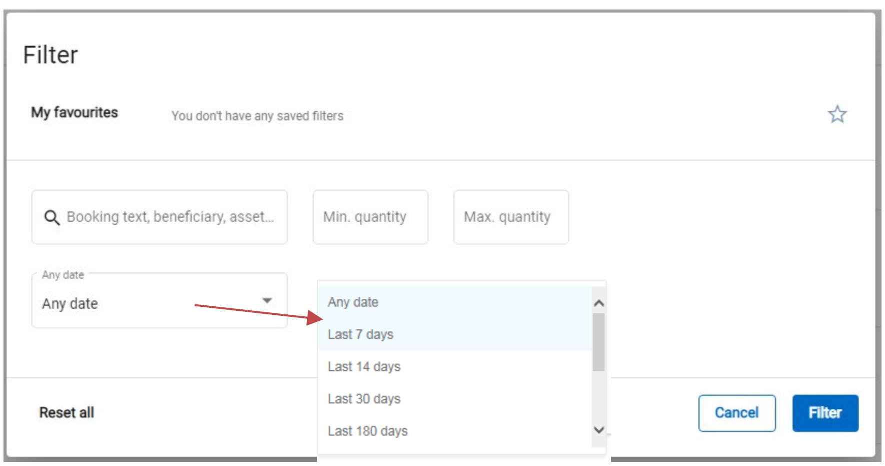


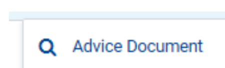
Bookings

The tab **Bookings** shows you the movements for each single portfolio. Cash account transactions are not included. Please check each cash account for booking details.



You can search transactions by inputting key words, defining time periods or setting amount range. You can also choose to search by verification date, transaction date or value date of transactions.

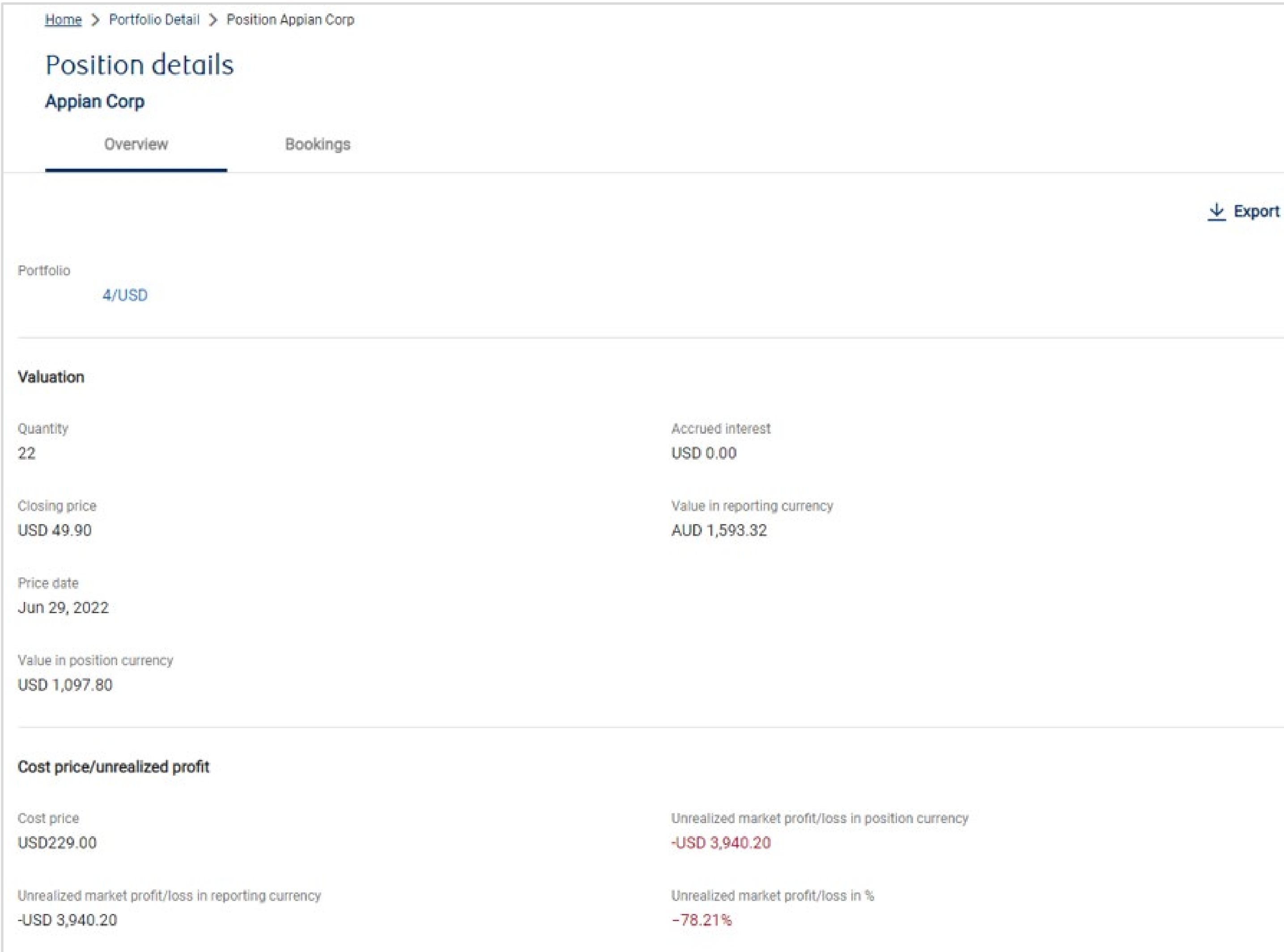




You can click at the end of the transaction record to show action menu **Advice Document** to open transaction advice PDF.

Position Details

You can view more details such as Valuation, Cost price/Unrealized Market Profit/Loss, Asset Information in **Position Details** page.



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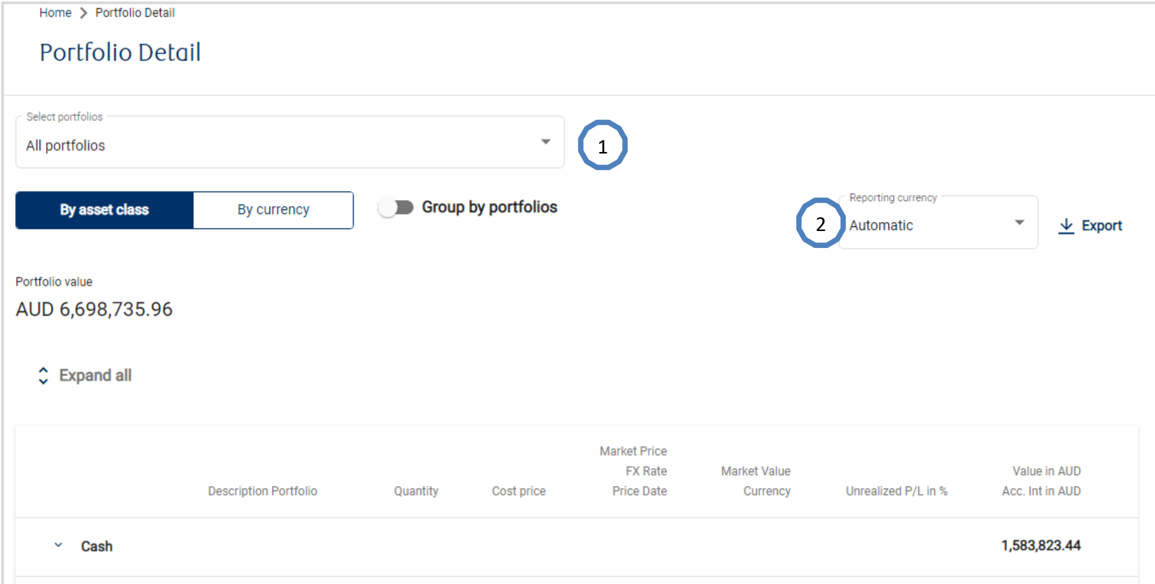
6. Menu Portfolio Detail

You can view your portfolio positions for the complete portfolio as well for each single portfolio in **Portfolio Detail** page.

1 You can view different portfolio by selecting portfolio from the portfolio dropdown list.

2 You can also change the reporting currency in the dropdown list.



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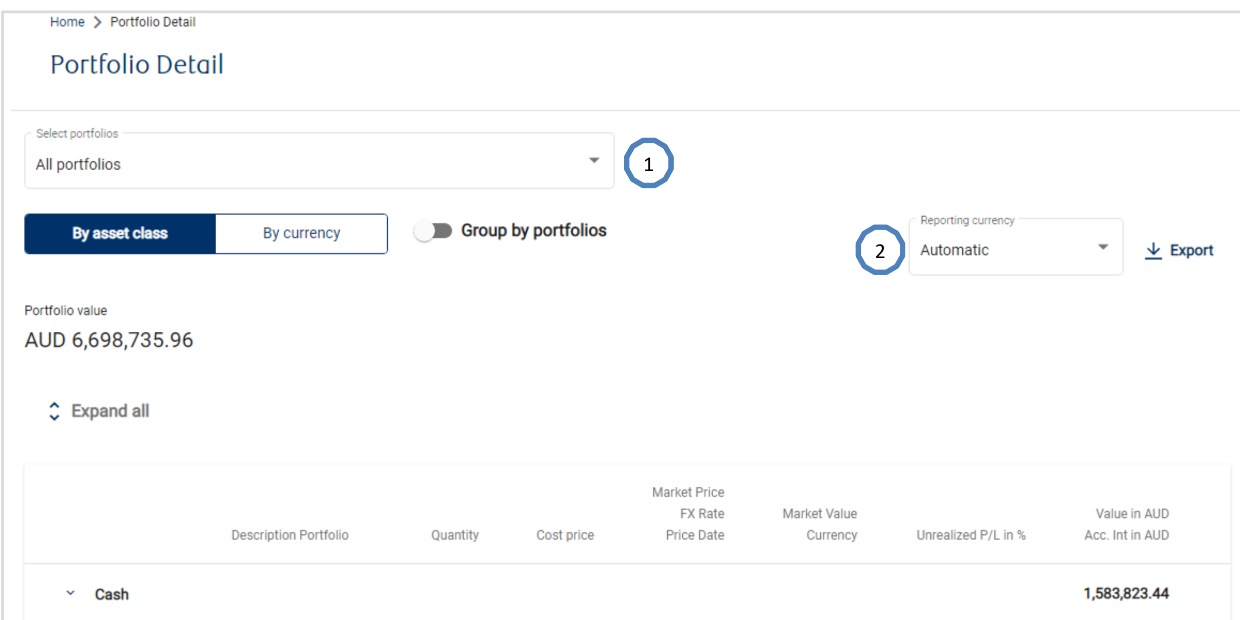
7. Menu Portfolio Analysis

The page **Portfolio Analysis** page provides summary for the complete portfolio as well for each single portfolio.

1 You can view different portfolio by selecting portfolio from portfolio dropdown list.

2 You can also change the reporting currency in the dropdown list.



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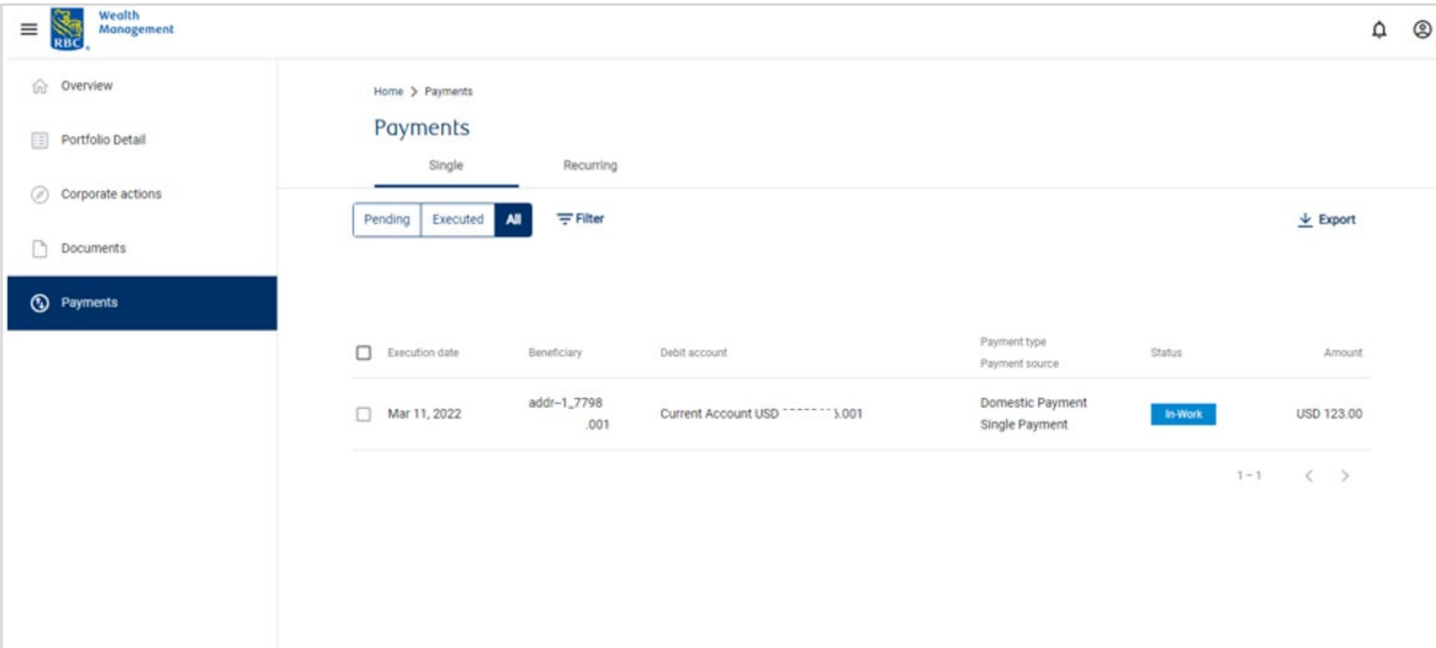
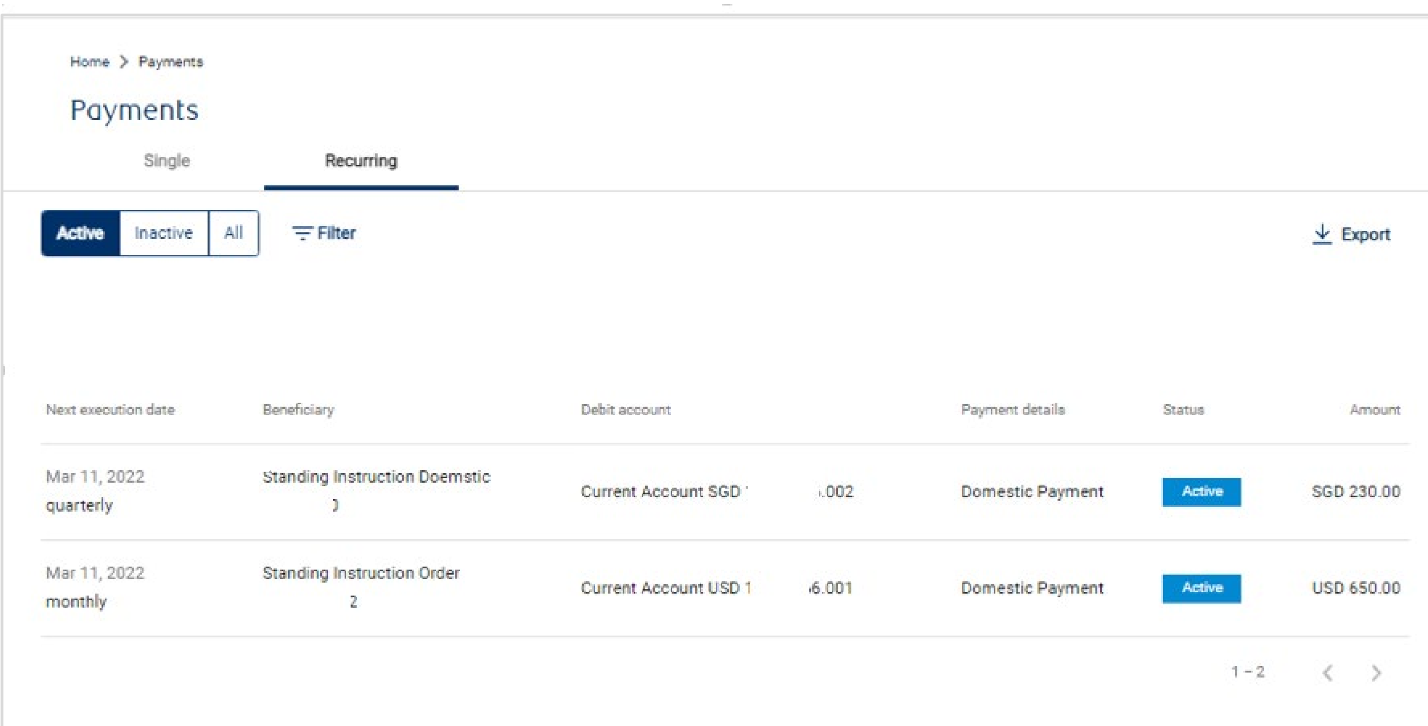
8. Payments

By selecting the “Payments” at the side menu can direct to the payment order book summary page, which shows both single payment execution and standing instruction.





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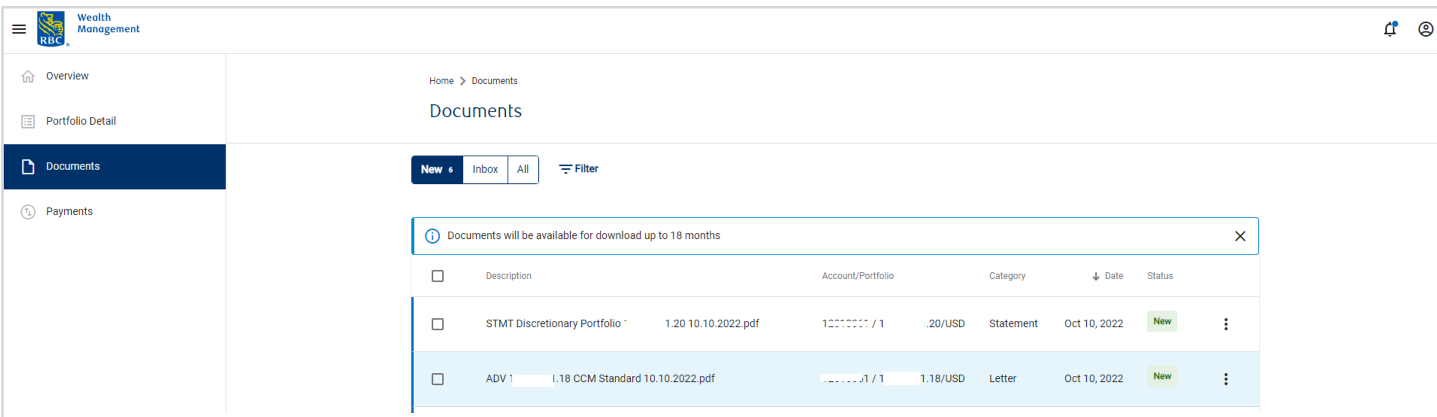
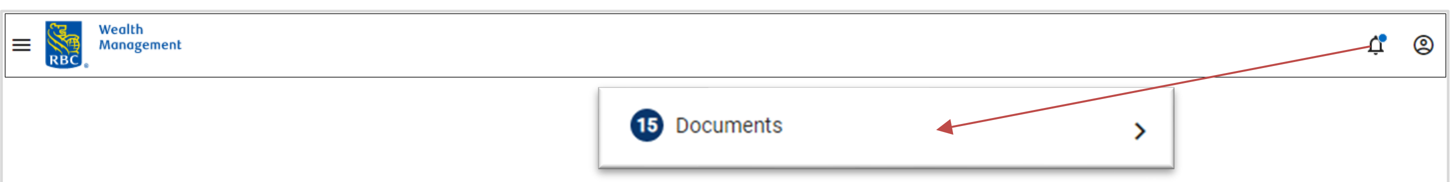
9. Documents

In **Documents** section, you will be able to view the advices of the transactions executed in the portfolio and the month end client statement. The advices will be generated after the transactions have been verified after the End of Day (EOD) process. Document **Date** refers to transaction value date for transaction advices and month end date for client monthly statements. You can either click the selected document line or the icon "**…**" at the end of the document line to download the PDF. The documents remain available online for 18 months.

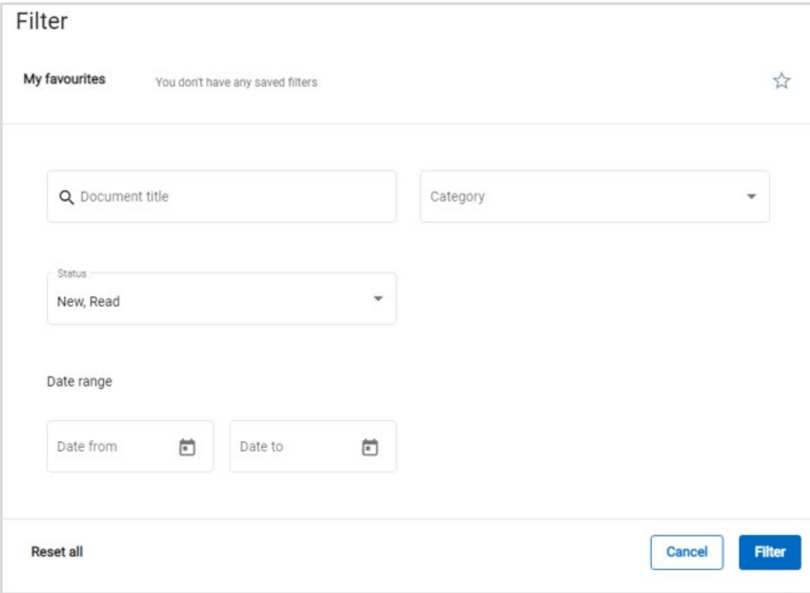
The official transaction advices and monthly statements will be sent or available for collection as per maling instruction given.



All unread documents have **New** state. You can also see total number of new documents from the **Documents** icon on top.



You can also view documents by different searching criteria as shown below.



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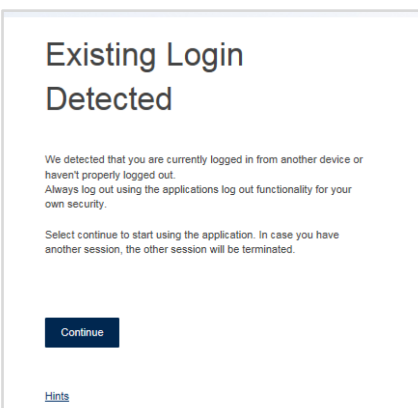
10. Others

You may see the "existing login detected" message as shown, for in the following two scenarios:

- If your previous session was logged out due to inactivity within the past hour
- If you are currently logged in via other devices

Click **Continue** to proceed.



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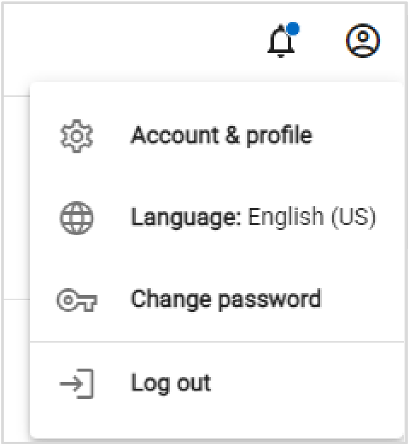
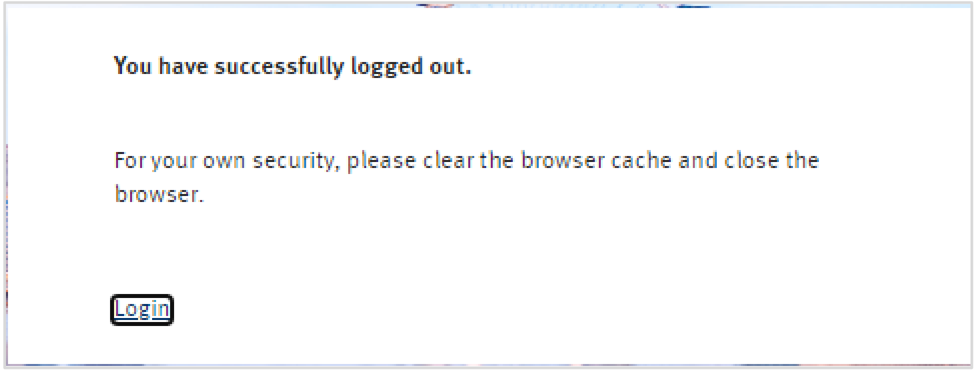
11. Logout

You can click Log out under the User icon to logout your session. Your session will be auto logged out after 15 minutes of inactivity. When you are trying to log in from multiple devices, your previous session will be auto logged out after new session logged in successfully.


Account & profile
Language: English (US)
Change password
Log out


You have successfully logged out.
For your own security, please clear the browser cache and close the browser.
Login

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