



Wealth
Management



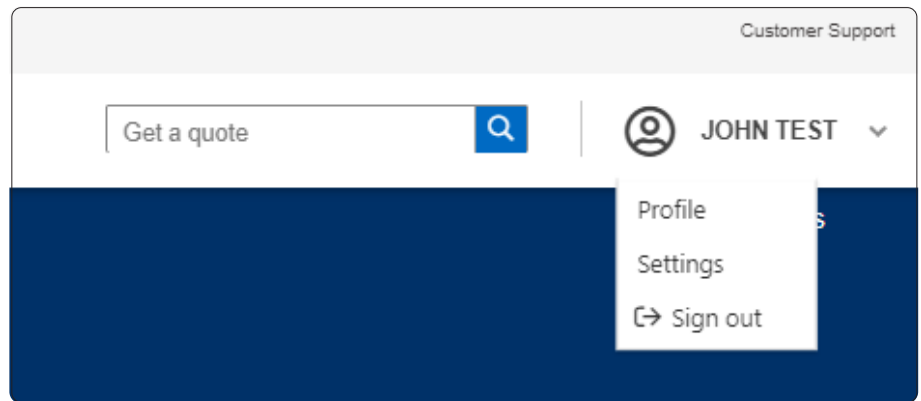
RBC Wealth Management Online
Questions? We're here to help
– contact our Helpdesk at
1-866-342-3992, or contact your
Investment Counselling team.

See the big picture with Account Groups

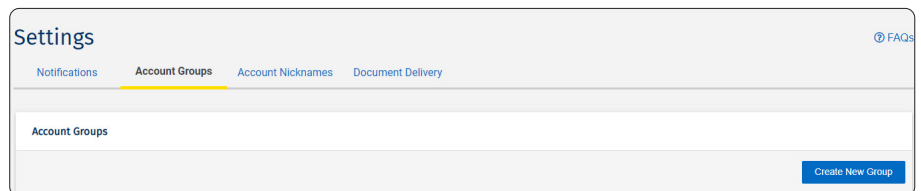
With Account Groups, it's easy to see your combined balances and investment information by bundling single accounts together. You can see Account Groups on your Homepage, and Holdings and Activities pages.

Here's how to create an Account Group

1. Go to www.rbcphnic.com and sign in at the top right corner 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 signed in, click on your "Your Name" at the top right, then select "Settings."



3. Click on "Account Groups" and select "Create New Group."



4. Next:

- Enter your Group Name
- Enter your Description
- Select the accounts to be added in your group
- Click “Save”

Create New Group [Close]

Group Name
Group Name 1

Description
Discription 2

Accounts Included in Group [Dropdown] Combined Total CAD

<input checked="" type="checkbox"/>	11111111 - RIF	361,004,902.39
<input checked="" type="checkbox"/>	22222222 - Investment	75,286,284.01
<input checked="" type="checkbox"/>	33333333 - Investment	24,748,136.69
<input checked="" type="checkbox"/>	44444444 - Investment	16,425,154.43

1 2 3 4

Save Cancel

That’s it – you’re done! You will now see your Account Groups on RBC Wealth Management Online.


Settings [FAQs]

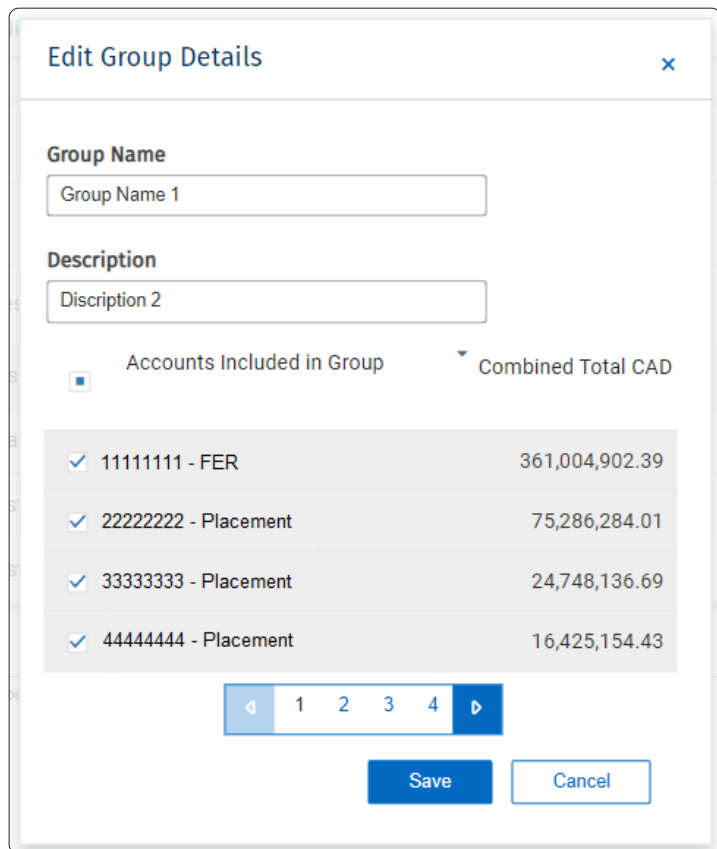
Notifications **Account Groups** Account Nicknames Document Delivery

✔ Your Account Group has been created.

Account Groups [Create New Group]

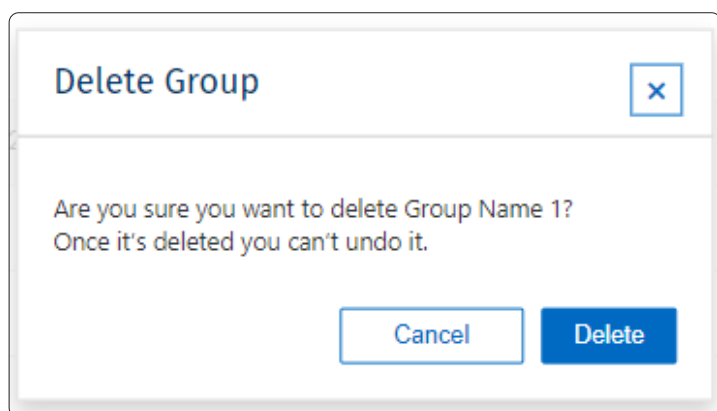
Group	Description	Combined Total CAD		
Group Name 1	Description 1	477,464,477.52	[Trash]	[Edit]

If you ever want to edit your account group, click on the “edit” icon (), enter changes, and click save.



Accounts Included in Group	Combined Total CAD
<input checked="" type="checkbox"/> 11111111 - FER	361,004,902.39
<input checked="" type="checkbox"/> 22222222 - Placement	75,286,284.01
<input checked="" type="checkbox"/> 33333333 - Placement	24,748,136.69
<input checked="" type="checkbox"/> 44444444 - Placement	16,425,154.43

To delete your account group, simply click on the “delete” icon and click “Delete” to confirm.
Note: Once a group is deleted, it cannot be undone.



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