

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."

Settings				() FAQ
Notifications	Account Groups	Account Nicknames	Document Delivery	
Account Groups				
				Create New Group

4. Next:

- Enter your Group NameEnter your Description
- Select the accounts to be added in your group
- Click "Save"

Creat	e New Group	×
Group	Name	
Group	Name 1	
Descrip Discrip	ption 2	
Acco	unts Included in Group Combined Total C.	AD
~	11111111 - RIF 361,004,902	.39
~	22222222 - Investment 75,286,284.	.01
~	33333333 - Investment 24,748,136.	.69
~	4444444 - Investment 16,425,154.	.43
	d 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						() F/
Notifications	Account Groups	Account Nicknames	Document Delivery			
O Your Accoun	t Group has been created.					
Account Groups						
					Crea	te New Gr
Group		Description		Combined Total CAD	Crea	te New G

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

Group Name 1	
Group Name 1	
oroup manie 1	
Description	
Discription 2	
Accounts Included in Group Combin	ned Total CAD
✓ 11111111 - FER 36	1,004,902.39
✓ 22222222 - Placement 7	5,286,284.01
✓ 33333333 - Placement 2	4,748,136.69
✓ 4444444 - Placement 1	6,425,154.43
Save	Cancel

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.

Delete Group		×			
Are you sure you want to delete Group Name 1? Once it's deleted you can't undo it.					
	Cancel	Delete			

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