

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				⑦ 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"

Create	e New Group ×
Group	
	Name 1
Descrip Discrip	
Accou	unts Included in Group Combined Total CAD
~	11111111 - RIF 361,004,902.39
~	22222222 - Investment 75,286,284.01
$\mathbf{\mathbf{Z}}$	33333333 - Investment 24,748,136.69
⊻	4444444 - Investment 16,425,154.43
	Save

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

Settings						⑦ FA
Notifications	Account Groups	Account Nicknames	Document Delivery			
Your Account	t Group has been created					
Account Groups						
					Creat	e New G
Group		Description	cr	ombined Total CAD	Creat	e New Gi

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

Group Name Group Name 1 Description Discription 2	
Description	
Discription 2	
Accounts Included in Group Combine	ed Total CAD
✓ 11111111 - FER 361	,004,902.39
✓ 22222222 - Placement 75,	,286,284.01
✓ 33333333 - Placement 24,	,748,136.69
✓ 44444444 - Placement 16,	,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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