



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 eDocuments to reduce your paperwork

eDocuments make it easy to reduce your paperwork and safely view your account documents from the convenience of your computer, tablet or smartphone.

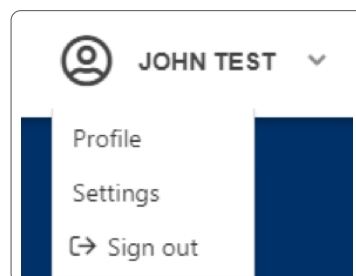
With eDocuments, you can access your account statements and tax documents through RBC Wealth Management Online – instead of receiving printed copies in the mail.

You can view, save and print your documents as PDF files, which means no more filing – and no more hunting through old files to retrieve past documents. With access to a seven-year archive, you'll be able to access past and current documents online at your convenience.

And unlike paper documents, which can be lost or damaged in the mail, your eDocuments are protected by your confidential password and the latest encryption technology.

## Turn on eDocuments in four easy steps

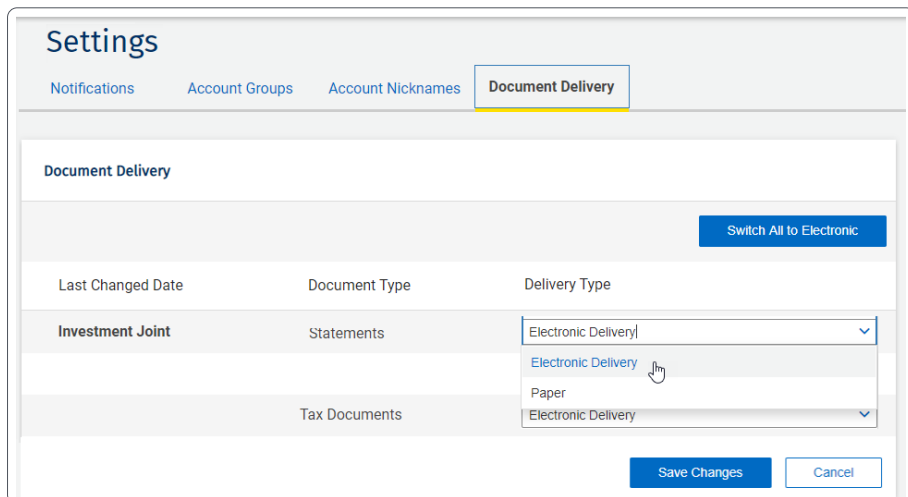
1. Go to [www.rbcphnic.com](http://www.rbcphnic.com), and sign in (top right corner) using your 16-digit client card number and password. If you don't know your client card number, contact your Investment Counselling team.
2. Once you've logged in, click on your name in the top right corner and click "Settings."



- 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.

- Next, please read the important Terms and Conditions. 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.”



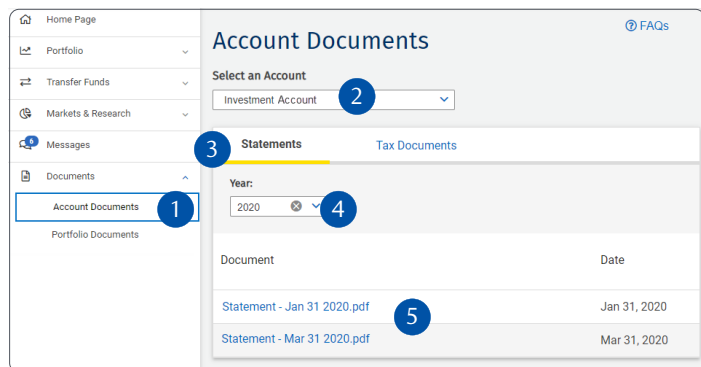
That’s it! You’re now ready to start viewing your eDocuments whenever you like.

## Here’s how to view your eDocuments

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

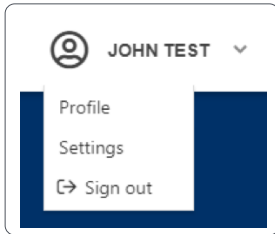
Select an account from the dropdown menu (2), the document type (3) and then the desired year (4).

Click on any of the documents (5) you want to open. If you want, you can save or print them. The documents 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>

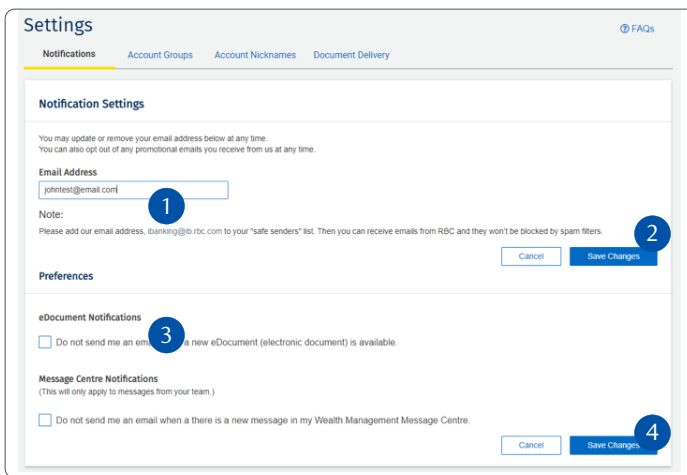


## Get notified when you have a new eDocument

We're happy to email you whenever you have a new eDocument – it's up to you. 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).



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

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## Frequently asked questions

### **Are eDocuments complimentary?**

Yes.

### **Can I receive tax documents as eDocuments?**

Yes, you can now receive many tax documents electronically. Because they're a newer feature, tax eDocuments are available from 2018 onwards in your archive.

### **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 eDocuments.

### **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).

### **Can corporate, trust and estate accounts choose eDocuments too?**

Yes. Individual accounts simply follow the steps above. For corporate, trust and estate accounts, we need special consent first. Please contact your Investment Counselling team, who will help set you up.

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