Wealth Management
PH&N Investment Counsel

RBC Wealth Management Mobile App

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

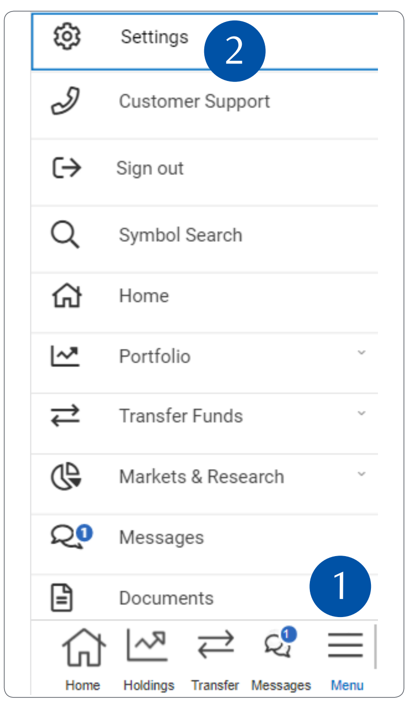
See the big picture with Account Groups

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:

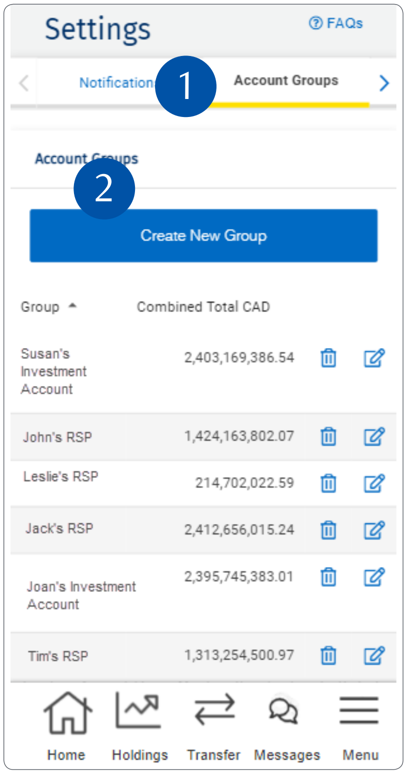
1. Sign into your RBC Mobile app. If you have not downloaded the RBC Mobile app, do so, through the App Store (iPhone) or the Google Play Store (Android).

   If you don't remember your ID/password, please contact the RBC Wealth Management Online Helpdesk at 1-866-342-3992. If you don't have access to RBC Wealth Management Online, please speak with your Investment Counselling team for assistance.

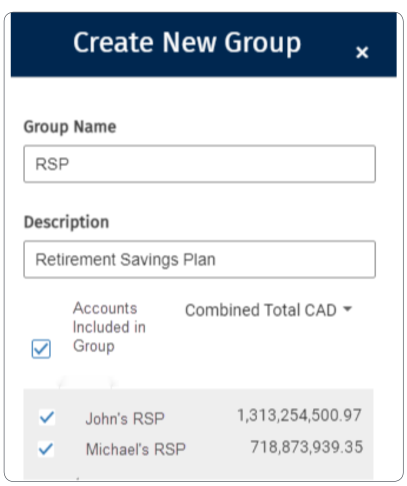
2. Once signed in, select the "Menu" tab (1) at the bottom of your smartphone screen, then select "Settings" (2).



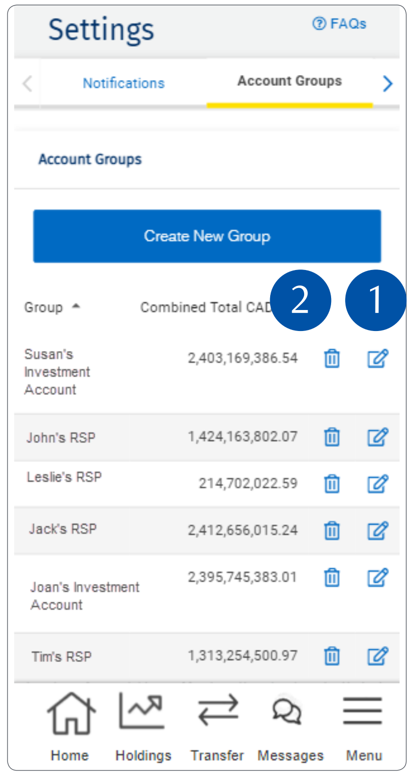
3. Use the right arrow to find “Account Groups” (1), then select “Create New Group” (2).



4. Next:
   - Enter your Group Name
   - Enter your Description
   - Select the accounts to be added in your group (make sure the selected box is filled with a checkmark)
   - Select “Save”



That’s it – you’re done! You will now see your Account Groups in the RBC Wealth Management Mobile App. If you ever want to edit your account group, tap on the “edit” icon, enter changes, and tap “Save” (1). To delete your account group, simply tap on the “delete” icon and select “Delete” to confirm (2). Note: Once a group is deleted, it cannot be undone.



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