
Online banking

Learn how to link your investing accounts in online banking

Step 1

Go to Link Investing Accounts

Once you have signed in to online banking, click the *Link Investing Accounts* link on the right side menu.

Welcome, Eva Elliott Contact Us Secure Messages Settings SIGN OUT

Accounts Bill Payments Transfers Alerts

Account Summary

\$8,273.93 Chequing & Savings **Add Investing** Add Mortgages & Loans Add Credit Cards

Chequing - 0 Chequing \$8,273.93 Select an Action

cdic sdc

Open A New Account

From high interest savings accounts to mortgages, we offer a wide range of great products.

ADD AN ACCOUNT

SEE FEATURED RATES

- CRA DIRECT DEPOSIT
- DOWNLOAD MONTHLY STATEMENTS
- REPORT LOST OR STOLEN CARD
- LINK INVESTING ACCOUNTS**
- STOP A PAYMENT

On the Link Your Investing Accounts page, select your provider

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Link Your Investing Accounts

Select your provider

If you have multiple client IDs for a provider, please link each one.

virtualwealth **Qtrade Investor**

Please Note: Mutual funds are offered through Credential Asset Management Inc. Online brokerage services are offered through Qtrade Investor. Mutual funds and other securities are offered through Credential Securities. Qtrade Investor and Credential Securities are divisions of Credential Qtrade Securities Inc. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Unless otherwise stated, cash balances, mutual funds and other securities are not insured nor guaranteed, their values change frequently and past performance may not be repeated. Credential Securities is a registered mark owned by Aviso Wealth Inc. VirtualWealth is a registered trade name of Credential Qtrade Securities Inc.

Step 2

Enter your information

In the Client ID field, enter your Client ID found on your VirtualWealth or Qtrade statements.

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Accounts Bill Payments Transfers Alerts

Link Your Investing Account

Enter your information below to link an account held at VirtualWealth. For added security, the date of birth on record at motusbank has been pre-populated and cannot be changed.

Enter your information

Client ID ⓘ	_____
Last Name	Elliott
Postal Code	L0S 1E0
Date of Birth	Sep 21st, 1971

Note: Mutual funds are offered through Credential Asset Management Inc. Online brokerage services are offered through Qtrade Investor. Mutual funds and other securities are offered through Credential Securities. Qtrade Investor and Credential Securities are divisions of Credential Qtrade Securities Inc. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Unless otherwise stated, cash balances, mutual funds and other securities are not insured nor guaranteed, their values change frequently and past performance may not be repeated. Credential Securities is a registered mark owned by Aviso Wealth Inc. VirtualWealth is a registered trade name of Credential Qtrade Securities Inc.

BAC **CONTINUE**

Your last name, postal code, and date of birth will auto-populate based on the Client ID you have entered. Click the **Continue** button to link this account.

Tip: To locate your Client ID on a statement, click on 'i' icon beside Client ID.

Continues on next page



On the next screen, you'll see a message indicating you have successfully linked your investment account.

The screenshot displays the Motusbank user interface. At the top left is the Motusbank logo. The top right navigation bar includes links for 'Welcome, Eva Elliott', 'Contact Us', 'Secure Messages', 'Settings', and a 'SIGN OUT' button. Below this is a secondary navigation bar with 'Accounts', 'Bill Payments', 'Transfers', and 'Alerts'. A prominent red banner at the top of the main content area reads 'Link Your Investing Account'. Below the banner, a green success message states 'Success! Your VirtualWealth account has been linked.' A second, smaller green message box says 'Your investing account is linked.' Below these messages is a table with account details:

Client ID V222Y6	Last Name Elliott	Postal Code LOS 1E0
Date of Birth Sep 21st, 1971	Provider VirtualWealth	

At the bottom of the page, there are two buttons: 'LINK ANOTHER ACCOUNT' and 'VIEW INVESTING SUMMARY'.

Step 3

View your investing account information

To view your investing account information, navigate back to the Account Summary home page and click on the *Investing* tab.

Select the investing account you wish to view.

Account Summary

VirtualWealth - 0
TFSAV5A22AHL

\$14,344.59
Market Value*

Select an Action

*Reflects values as of the last market close.

Open A New Account

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ADD AN ACCOUNT

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- REPORT LOST OR STOLEN CARD
- VIEW INVESTING SUMMARY
- STOP A PAYMENT

Tip: You can access your provider's account login portal by using the 'Select an Action' drop down menu.

VirtualWealth - 0

\$1,686.36 Cash Balance \$12,658.23 Securities Value \$14,344.59 Total Market Value*

VirtualWealth

SECURITY NAME	SYMBOL	QUANTITY	CURRENT PRICE	MARKET VALUE	% OF HOLDING
ISHB CORE S&P TOT US STK ETF	ITOT	33.000	\$79.33	\$3,422.89	23.86 %
ISHB CORE MSCI TOT INTL ETF	IXUS	35.000	\$59.72	\$2,722.94	19.05 %
VANGUARD CDN AGG BD IND ETF	VAB	49.000	\$27.40	\$1,342.60	9.36 %
VANGUARD FTSE CDA ALL ETF	VCN	125.000	\$33.56	\$4,195.00	29.24 %
VANGUARD US AGG BD HEDG ETF	VBU	36.000	\$26.80	\$964.80	6.73 %

Continues on next page

For the selected account, you will see a high-level summary of your account details, such as the total market value of your investments, account holdings, account history, and other details.

You can give your account a nickname, and print or download your account information.

motusbank

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Accounts Bill Payments Transfers Alerts

VirtualWealth - 0 **\$1,686.36** **\$12,658.23** **\$14,344.59**

RENAME Cash Balance Securities Value Total Market Value* Select an action

HOLDINGS HISTORY DETAILS

VirtualWealth Download: Select PRINT

SECURITY NAME	SYMBOL	QUANTITY	CURRENT PRICE	MARKET VALUE	% OF HOLDING
ISHRS CORE S&P TOT US STK ETF	ITOT	33.000	\$79.33	\$3,422.89	23.86 %
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VANGUARD US AGR BD HEDG ETF	VBU	36.000	\$26.80	\$964.80	6.73 %

Step 4

Unlink your investing account

To unlink your investing account from motusbank Online Banking, navigate back to the Account Summary home page and click on the *View Investing Summary*.

Welcome, Eva Elliott Contact Us Secure Messages Settings SIGN OUT

Accounts Bill Payments Transfers Alerts

Account Summary

\$8,273.93 Chequing & Savings **\$14,344.59** Investing Add Mortgages & Loans Add Credit Cards

Account Name	Balance	Action
Chequing - 0 Chequing	\$8,273.93	Select an Action
VirtualWealth - 0 TFSA V5A22AHL	\$14,344.59 Market Value*	Select an Action

*Reflects values as of the last market close.

cdic sadc

Open A New Account

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- VIEW INVESTING SUMMARY**
- STOP A PAYMENT

On the Investing Summary page you will see a list of all your linked investing accounts.

Click the 'X' icon beside the account you wish to remove.

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Accounts Bill Payments Transfers Alerts

Your Investing Summary

Manage Accounts Download: Select LINK ANOTHER ACCOUNT

LINKED ACCOUNTS	CLIENT ID	TOTAL MARKET VALUE*
VirtualWealth	V222Y6	\$14,344.59
TOTAL:		\$14,344.59

Note: Mutual funds are offered through Creditwise Asset Management Inc. Online brokerage services are offered through Creditwise Investor. Mutual funds and other securities are offered through Creditwise Securities. Creditwise Investor and Creditwise Securities are divisions of Creditwise Group Securities Inc. Commissions, trading commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Unless otherwise stated, cash balances, mutual funds and other securities are not insured nor guaranteed, their values change frequently and past performance may not be repeated. Creditwise Securities is a registered mark owned by Avito Wealth Inc. VirtualWealth is a registered trade name of Creditwise Group Securities Inc.

Continues on next page

Click 'Yes' to confirm that you wish to unlink this account.



Your Investing Summary

Manage Accounts Download: Select [LINK ANOTHER ACCOUNT](#)

LINKED ACCOUNTS	CLIENT ID	TOTAL MARKET VALUE*	UNLINK
VirtualWealth	Unlink your investing account? NC	\$14,344.59	YES

TOTAL: \$14,344.59

Note: Mutual funds are offered through Credential Asset Management Inc. Online brokerage services are offered through Qtrade Investor. Mutual funds and other securities are offered through Credential Securities. Qtrade Investor and Credential Securities are divisions of Credential Qtrade Securities Inc. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Unless otherwise stated, cash balances, mutual funds and other securities are not insured nor guaranteed, their values change frequently and past performance may not be repeated. Credential Securities is a registered mark owned by Aviso Wealth Inc. VirtualWealth is a registered trade name of Credential Qtrade Securities Inc.



You will see a message indicating you have successfully unlinked your investment account.

Your Investing Summary

✔ Success! Your VirtualWealth account has been unlinked.

Manage Accounts Download: Select [LINK ANOTHER ACCOUNT](#)

LINKED ACCOUNTS	CLIENT ID	TOTAL MARKET VALUE*	UNLINK
No accounts linked.			

Note: Mutual funds are offered through Credential Asset Management Inc. Online brokerage services are offered through Qtrade Investor. Mutual funds and other securities are offered through Credential Securities. Qtrade Investor and Credential Securities are divisions of Credential Qtrade Securities Inc. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Unless otherwise stated, cash balances, mutual funds and other securities are not insured nor guaranteed, their values change frequently and past performance may not be repeated. Credential Securities is a registered mark owned by Aviso Wealth Inc. VirtualWealth is a registered trade name of Credential Qtrade Securities Inc.

Tip: you can re-link accounts any time by following steps 1 and 2.

