

Client Access Registration Process and how to “Go Paperless”

Getting Started

Before registering for access, you will need to gather the “Client ID” of all accounts for which you want to request access. You can request access under the same user ID for multiple Client IDs related to all of your RGF Wealth Management Ltd. securities accounts.

The “Client ID” is the first five digits of your account number. You can either find the client ID in the upper right-hand corner of your statement or you can ask your advisory team.

Your Tax-Free Savings Statement

For the period ending September 30, 2015

Account number **C09-ZX0K-0**
 : SMITH JOHN

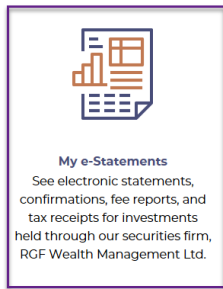
Registering for Access

1. From the www.rgfwealth.com website, please click the **My e-Statements** link at the top of the page.



Portfolio

RGF's Investor Portal allows you to access a consolidated summary of all investment accounts, transactions and insurance policies.



My e-Statements

See electronic statements, confirmations, fee reports, and tax receipts for investments held through our securities firm, RGF Wealth Management Ltd.

2. Once the page loads, click the **REGISTER** button. This will launch the **Client Access Registration Form**
3. Complete the **Client Access Registration Form**. If you are requesting access to multiple Client IDs, you will enter them in the form as follows:

The first 5 characters in the account numbers (omitting the dashes) of all the accounts you want to access online

c09zx c09zy c09zz

*If you're providing more than one, separate them with spaces
 Example: 8Z123 9Z123 AZ1ZZ*

Remember that the password you create on the **Client Access Registration Form** must meet the following criteria:

Passwords are required to be at least 7 characters long and must contain at least one number and a mix of uppercase and lowercase letters

4. When the form is completed fully, press the **Register** button in the lower left hand corner of the form. *Make sure you keep your ID and password in a safe place.*

Result 1: You will immediately receive the following message on

screen
 Thank you for registering for Online Access.
 You will receive an email confirming your registration request. Your Request will be processed within the next three business days, and you will be notified by email when your online account has been activated.

Result 2: Within hours, you will also receive an email with the subject: **“Your online account access details”**. This email contains your registration information and advises that you will be notified via email once your registration request has been processed and accepted.

Result 3: Within 3 business days, you will receive an email indicating your RGF Client Access account is activated.

5. Once you receive the 2nd email, you can login to the site.

Going Paperless

Going Paperless means you will stop receiving a paper copy of your statements, confirmations and/or tax slips and will be notified via email when an electronic copy is available for download. To “Go Paperless” you need to change your delivery method from “paper” to “online”, as illustrated below.

NOTE: The delivery method is controlled separately for statements, confirmations and tax slips and you can switch between the two options at any time. All accounts under the same Client ID must have the same delivery method, but if you have access to multiple Client IDs you can set the delivery method separately for each of them.

1. Once you have logged into the Client Access site, go to **MY PROFILE**, located on the menu bar.



2. Under **MY PROFILE**, you can select which document type you want to change your delivery method for by clicking on one of the following three links:

- [Change my email address](#)
- [Change my password](#)
- [Change my account statement delivery method](#)
- [Change my trade confirmation delivery method](#)
- [Change my tax receipt delivery method](#)

3. You will see your current delivery method indicated in the 3rd column called **Current statement delivery method**. If you are looking at your statement delivery method, you will either see **Paper statements** or **Online statements** indicated. To switch from one to the other, click the blue link in the last column.

Change Your Account Statement Delivery Method

Account name	Account numbers	Current statement delivery method	
JOHN SMITH	C09ZX0A0 C09ZX0K0 C09ZX0R0	Paper statements <i>updated as of 30/10/2015 1:53:16 PM</i>	<div style="border: 1px solid red; padding: 2px; display: inline-block; margin-bottom: 5px;">CLICK HERE TO CHANGE DELIVERY METHOD</div> <div style="background-color: #ffffcc; padding: 5px;"> Please enrol me in the Electronic Statement service at no charge and notify me by email when statements are available <ul style="list-style-type: none"> Selection will apply to the primary address of the accounts. Paper statements will no longer be mailed to you. You will receive email notification of your monthly statements. Depending on your selection date, you may receive one more paper statement in the mail before your option for Electronic Notification is processed. Save or print your electronic statements via the Client Site. </div>

4. After you click the link, you will see either an **Electronic Statement Service Agreement** or a **Reactivate Paper Statements** message. To accept the change of delivery method, click “I Agree”.

5. If you have changed your delivery method from paper to online, you will receive an email confirming that you have consented to receive email notifications when the particular document is ready and that the document will no longer be printed and mailed to you.