

How to link accounts in MyAdvisor

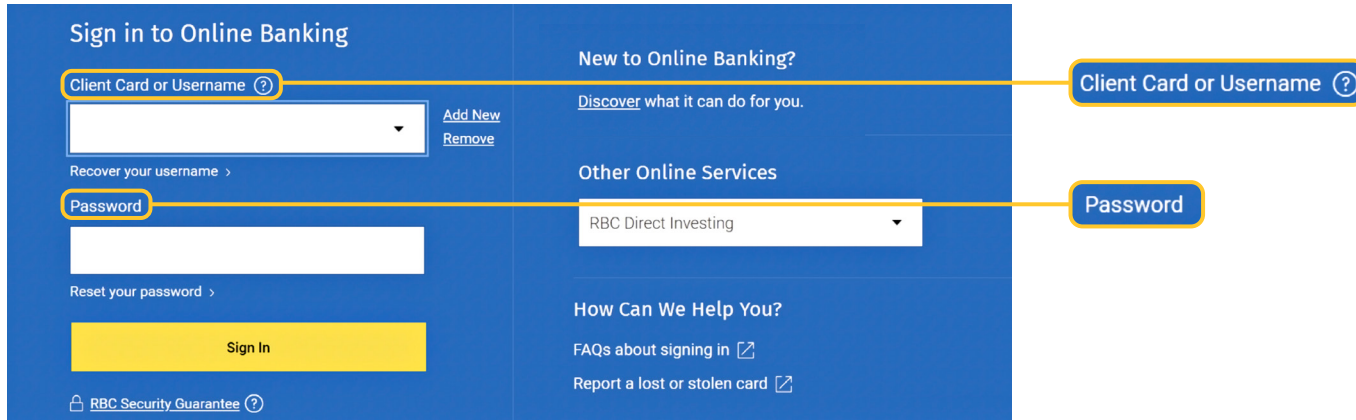


Welcome to our step-by-step guide on how to link accounts in MyAdvisor®.

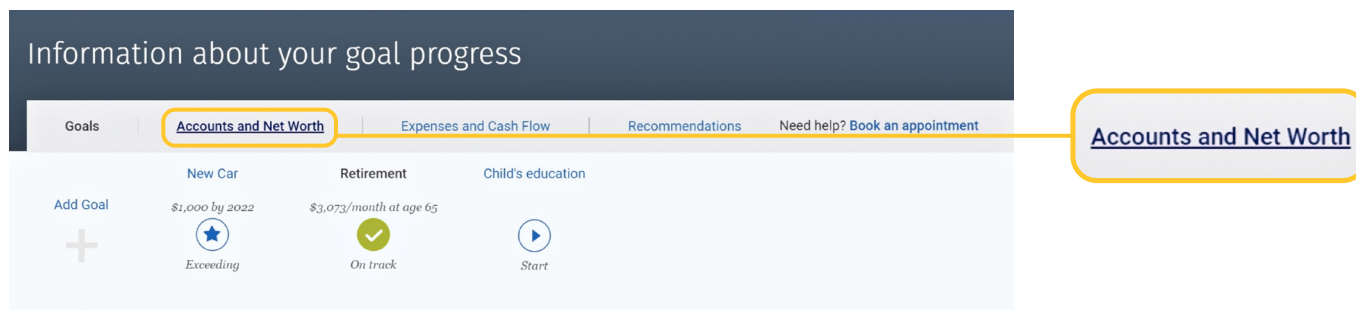
In MyAdvisor you will automatically see all your RBC® accounts. But did you know you can link accounts you have outside RBC so you can see all your accounts in one place? This feature gives you your full financial picture.



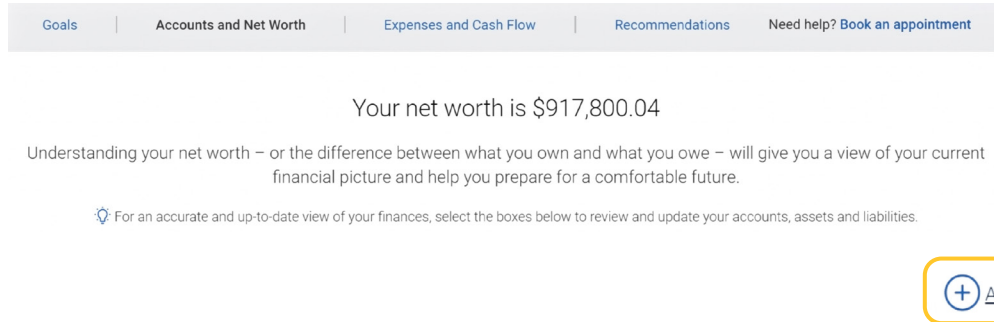
- 1 To link outside accounts, start by **logging in to MyAdvisor** from RBC Online Banking. For assistance, refer to our “How to log in to MyAdvisor” guide.



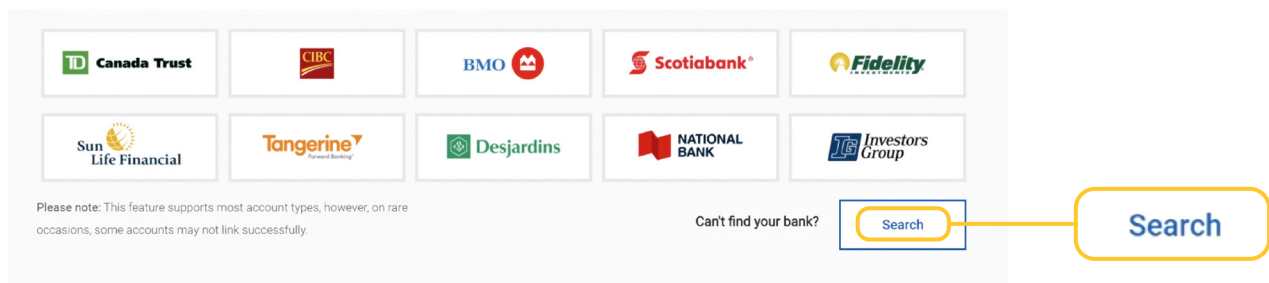
- 2 From your MyAdvisor homepage, select the **Accounts and Net Worth** tab at the top of the page.



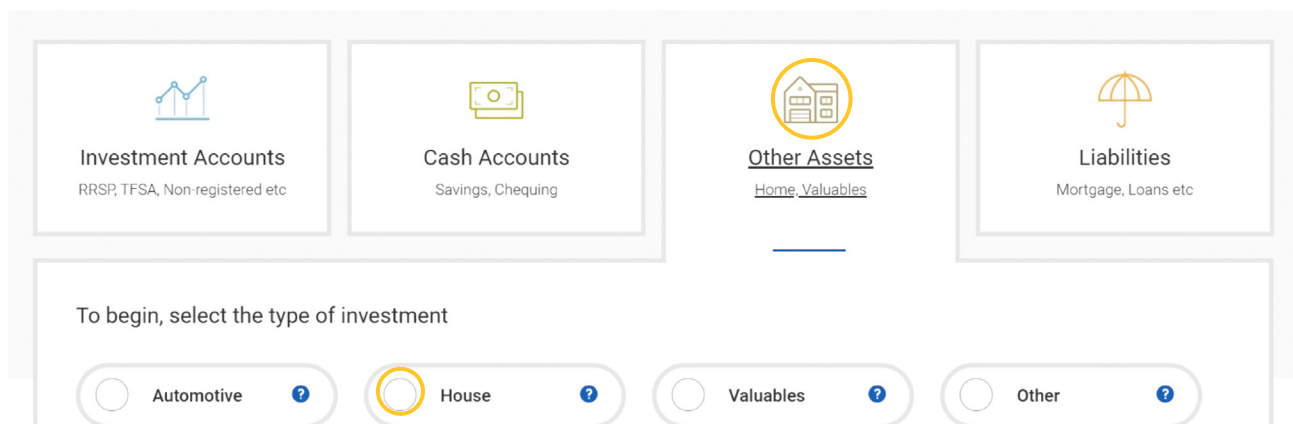
3 Click **Add an asset, account or liability** to get started. There are two ways to link your accounts: **automatically** by clicking the options listed, or **manually** by adding your account information.



4a If you prefer to link your accounts **automatically**, select your bank or click **Search** to find your bank.



4b If you prefer to **manually add** your information, **enter the accounts, assets and liabilities** you have at other banks and financial institutions by clicking on the category (e.g. Other Assets) and manually inputting the information (e.g. House). The site will walk you through the process of inputting all the necessary information.



5a Next, **enter your login credentials**, which will give us permission to link your accounts. Don't worry, it's a view of your accounts only; no money is transferred.

www.tdcanadatrust.com
authentication.td.com

Description (optional)

Username or Access Card (no spaces)

Username or Access Card (no spaces)

5b Once you've manually filled in the information, click **Add This Asset** or **Add This Account**, etc. Repeat these two steps until you've entered all of your assets, accounts and liabilities.

Nickname this asset

Select something easy to identify and differentiate

What is the current value? ¹

It's okay to enter an approximate balance.

[Save and add another account](#)

