

How to book an appointment in MyAdvisor



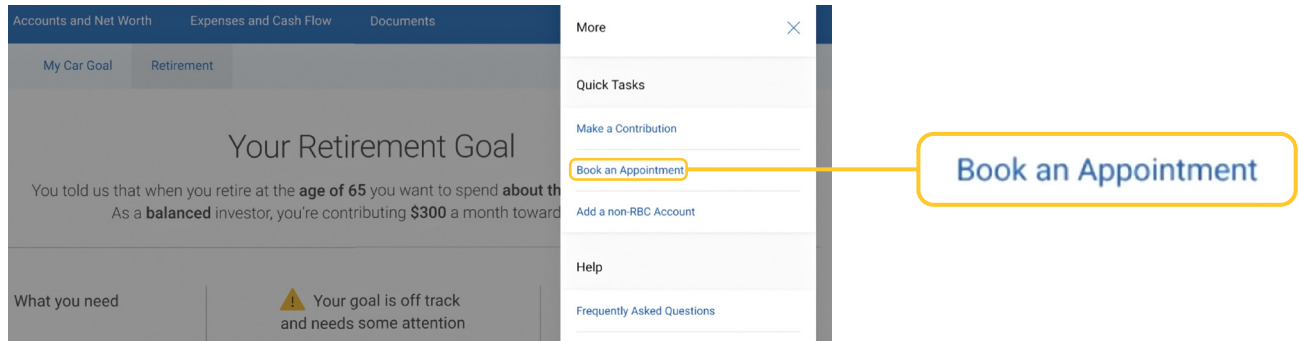
Welcome to our step-by-step guide on how to book an appointment in MyAdvisor®.



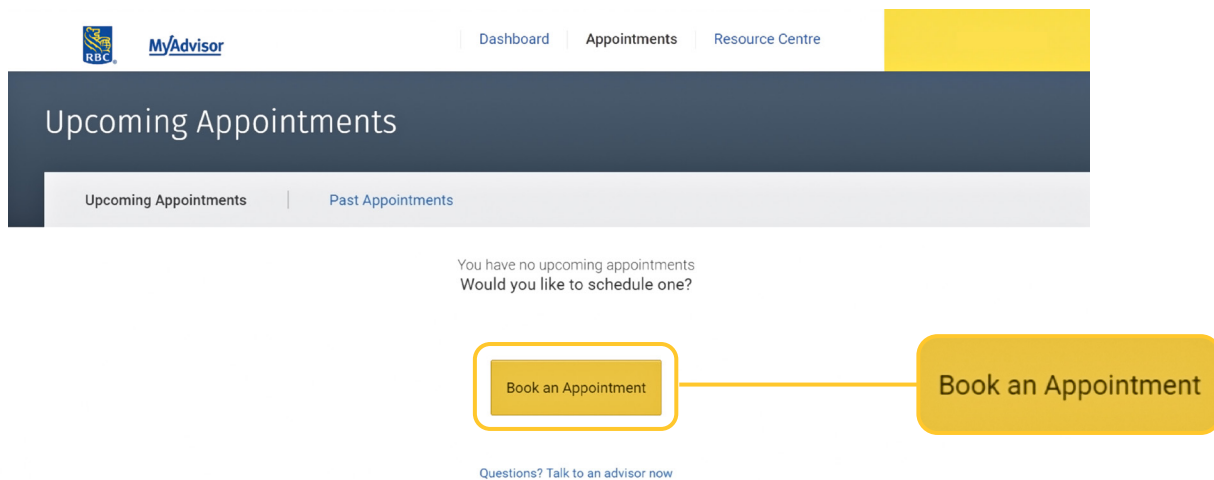
- 1 To begin, **log in to MyAdvisor** from RBC® Online Banking. For assistance, refer to our “How to log in to MyAdvisor” guide.

- 2 Once you’ve logged in, from your MyAdvisor homepage, click **More** at the top of the page.

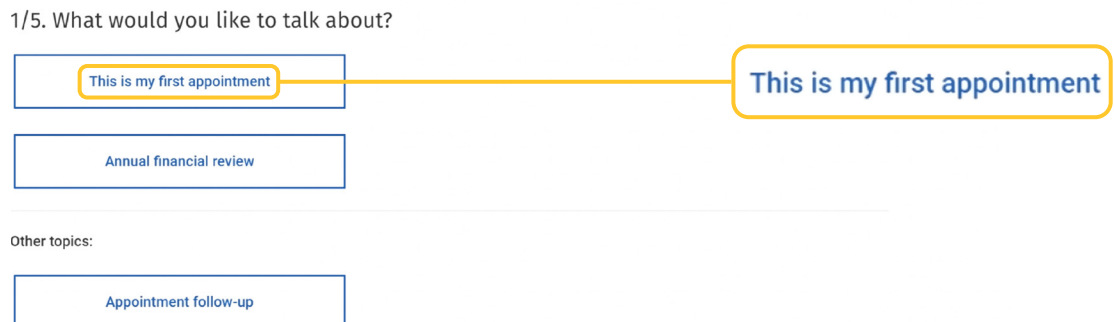
3 You will then see a dropdown menu. Click **Book an Appointment** from the menu.



4 On this page, you will have the ability to see both your upcoming and past appointments. If you have no appointments scheduled, you will be prompted to schedule one. Click **Book an Appointment**.



5 From here, you will be asked, **What would you like to talk about?** We use these options to help serve you better. Select the one that fits your needs the best.



6 Next you will be asked, **Who would you like to speak to?** You have three choices:

- Click **First available advisor** if you would like to be paired with the first advisor available in your area.

Agenda This is my first appointment Change

2/5. Who would you like to speak to?

Choose an advisor you've met with before, or the first available advisor or search.

First available advisor

- Click the **Advisor** button if you would like to speak to a specific advisor, then enter the advisor's name.

_____ or _____

Search for:

Advisor Branch

If you already have an RBC Financial Planner, their name and schedule will automatically appear.

- Click the **Branch** button and **type in your postal code** if you would like to meet with an advisor near you. A list and map of branches in your area will appear.

Search for:

Advisor Branch

Select a branch

RBC Royal Bank 1 Main St N Open - Closes 6 p.m. (905) 874-4800	WEBSITE	DIRECTIONS
RBC Royal Bank Mississauga, ON - In Derry Vill... Open - Closes 6 p.m. (905) 795-2588	WEBSITE	DIRECTIONS
RBC Royal Bank 209 County Ct Blvd Open - Closes 6 p.m. (905) 796-6200	WEBSITE	DIRECTIONS
RBC Royal Bank 8978 Chinguacousy Rd Open - Closes 6 p.m. (905) 874-7756	WEBSITE	DIRECTIONS

7 Once you choose *who* you would like to speak to, you will be asked, **How would you like to speak with your Advisor?**

Select **Video conference**, **Phone call** or **Meet at a branch**.

3/5. How would you like to speak with your Advisor?

Phone call

8 Next, **select your preferred time of day**, morning, afternoon or evening, and a **specific hour** that works best for you.

4/5. Select your preferred time:

Morning 8 a.m. - 12 p.m.	Afternoon 12 p.m. - 4 p.m.	Evening 4 p.m. - 11 p.m.
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Today 26/11/2020	1:00 p.m.
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Today 26/11/2020	3:45 p.m.
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1:00 p.m.

9 Finally, **enter your phone number**. This is in case your advisor needs to contact you before or after your appointment.

5/5. Please enter your phone number

your Advisor will use this number if there is a need to follow up with you.

(XXX) XXX-XXXX	<input type="checkbox"/> Please text me messages related to my appointment.
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Confirm Appointment

(XXX) XXX-XXXX

10 Click **Confirm Appointment**, and you'll be directed to a confirmation page with your appointment details.

You're all set to meet with an advisor for any advice and support you need!

5/5. Please enter your phone number

your Advisor will use this number if there is a need to follow up with you.

(XXX) XXX-XXXX	<input type="checkbox"/> Please text me messages related to my appointment.
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Confirm Appointment

Confirm Appointment

