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

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**.

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.
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.

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

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.

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

![](image1)

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

![](image2)

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!