

How to add a goal in MyAdvisor



Welcome to our step-by-step guide on how to add a goal 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 **Add a Goal** at the top of the page.

3 Now it's time to identify what you are saving for by choosing 1 of 8 financial goals.

What are you saving for?

Select the financial goal you want to reach.

 Home purchase	 Education	 Vehicle	 Vacation	 Vehicle
 Wedding	 Gift or donation	 Me. Just me.	 Something else	

4 Once you've chosen your goal, describe it in the box below. When you're done, click Add Details.

 Home purchase	 Education	 Vehicle	 Vacation
 Wedding	 Gift or donation	 Me. Just me.	 Something else

Please select the goal you want to reach

Describe this goal

<input type="text" value="New Car"/>	<input type="text" value="New Car"/>
<input type="text" value="Add Details"/>	<input type="text" value="Add Details"/>

Please describe this goal

5 Here you will be asked a few questions about your goal. Don't worry if it's an estimate; you can change this at any time.

Is financing needed?

Yes No

Target down payment

\$

When do you want to reach your goal?

6 Select the account you will use to reach this goal. Then answer the questions presented.

Which accounts will you use to reach this goal?

Here are the available accounts we have on file for you.

Type	Balance	Contribution details
<input type="checkbox"/> Savings	\$2,186.99	\$0.00 Monthly
<input checked="" type="checkbox"/> Savings	\$9,817.60	\$0.00 Monthly

Savings

When will you start to save?

I already save regularly

How much will you save annually?

\$ 5,000 per year

How long do you plan to save?

03 years

7 Now we want to learn about your investment style. First, how much risk are you willing to take?

Click the button on the scale that most applies to you. A detailed description for each button will appear to help you choose accurately.

Knowing that financial markets go up and down over time, how much risk are you willing to take with your investments?

Very Low Low Below Average Average Above Average High

Why are you asking about this again?

Every goal is different and your risk tolerance can change depending on the type of goal, the time frame and the amount you want to save. Your answers will be used to calculate the projected rate at which your investments will grow. We'll review your responses during your advisor appointment.

Average

I am willing to accept moderate fluctuation. Some growth and the potential for returns are important to me.

8 Next, is your objective security or growth? Click the button on the scale that most applies to you.

A detailed description for each button will appear to help you choose accurately. Click **Add Goal**.

Secure Very Conservative Conservative Balanced Growth Aggressive Growth

Balanced

I want a balanced combination of income and moderate investment growth. I can accept fluctuations in the value of my investments for the potential of higher returns.

9 You're all done! Click **Talk to an Advisor** to book an appointment or **I'll do this later** to go back to your homepage, where you will see the progress of the goal you've just set up.

All done,

New Car has been added to your financial picture. You've taken another step towards a brighter financial future. An Advisor can help you set up automatic contributions and reach your goal faster.



Your goal is in great shape!

If your contributions stay as is, you're projected* to receive approximately **\$15,000** in 2024. That's 100% of your \$15,000 goal. See below for tips on how to optimize the extra investments you may have on hand.

^ * These projections are based on the information you provided.

You'll have a more accurate projection of your goal if you include:

- Additional RBC accounts
- External accounts

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