Add external accounts with RBC Total Wealth

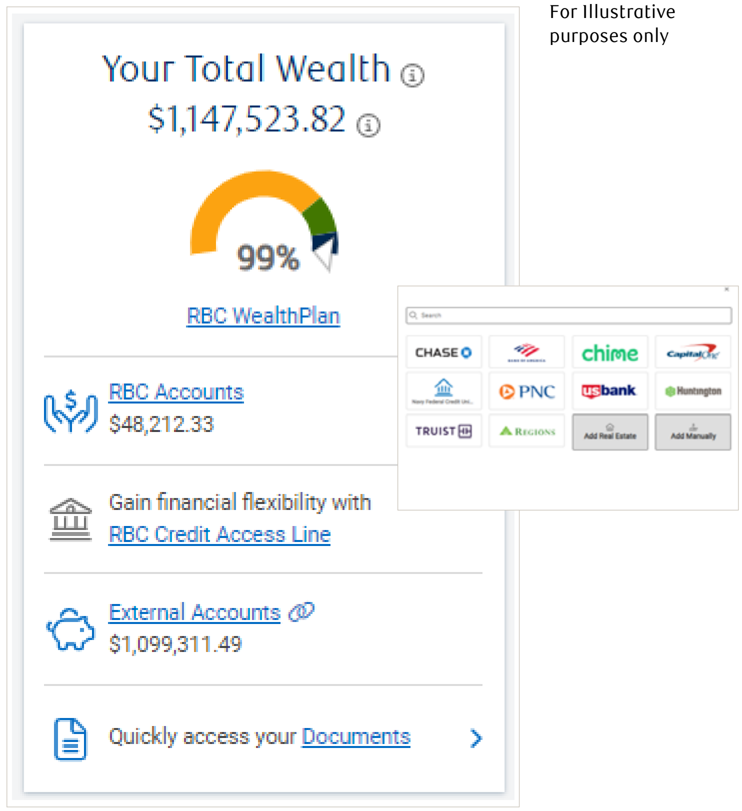
Wealth Management

RBC Total Wealth helps organize your information and delivers a view of your financial life in one convenient place. With secure connections to thousands of financial institutions and access to a wide assortment of accounts—including checking, credit cards, 401(k), mortgages and more—you and your advisor gain a more complete view of your financial picture.

Connecting your external financial accounts

Log in to your RBC Wealth Management Online account and complete the following steps:

1. From your Home page, in the Your Total Wealth section at the top of the screen, click the piggy bank icon or "External Accounts." From the Total Wealth section, click the "Add Accounts" button to begin.
2. A box will appear that will allow you to connect accounts by searching for the financial institution and entering your username and password. Or you can enter the accounts manually with a value, name and account type.
3. To search for the institution you want to add, click the "Connect Accounts" button, press "Continue," and you will be prompted to search for the institution. Check the box for the reCAPTCHA process and enter your username and password. You may be asked to complete the external institution's two-factor authentication by inputting a one-time use code that is delivered by text or email.
4. After completing setup, your Home page should refresh and your external account(s) will display in the External Account section.



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Investment and insurance products offered through RBC Wealth Management are not insured by the FDIC or any other federal government agency, are not deposits or other obligations of, or guaranteed by, a bank or any bank affiliate, and are subject to investment risks, including possible loss of the principal amount invested.

Managing and reconnecting your external accounts

From the Wealth Management Online Home page in the External Accounts section, you can click the "Manage External Accounts" button to open the Accounts screen and manage the details/status of accounts already listed. You can also click the "Add Accounts" button to add additional external accounts.

The green checkmark indicates that the account data is synced with RBC Wealth Management Online.

A red triangle indicates that the link to the account is broken, which may happen if you change your username or password at the institution that holds the account, or you need to re-enter the two factor authentication. To reset the connection:

1. Click the "Reconnect" button on the Manage External Accounts screen.
2. In the pop-up window, click "Reconnect Account."
3. In the dialog box that opens, follow the prompts to enter your username and password for the financial institution.

To edit the account details, including the account name, account type and the ability to hide the account click the "Edit" button.

To change the nickname for your account, edit the name in the Account Name field. Your account nickname displays only on RBC Wealth Management systems.

To prevent an external account from being included in your Total Wealth section, you can hide a specific account by checking the box.

Use the Account Type drop-down list to change the account type.

Questions?

If you have technical or functional questions about this site, call Client Support Services, toll free at (800) 933-9946 weekdays from 8 a.m. to 10 p.m. (ET) and Saturday from 10 a.m. to 6 p.m. (ET).

If you have investment questions, contact your financial advisor.