

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 real estate—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 “External Accounts.” From the “External Accounts” section, click “Edit” and then “Add an Account” button to begin.

Your Total Wealth
\$1,197,523.82

RBC Accounts	\$48,212.33
RBC Credit Access Line	\$50,000.00
External Accounts	\$1,099,311.49

RBC WealthPlan
89% Above Confidence Zone

[RBC Credit Access Line](#)
Potential loan value \$1,966,590.69

[External Accounts](#)
\$338,283.04

Quickly access your [Documents](#)

- 2 A box will appear that will allow you to connect accounts by clicking on the most commonly used financial institution tiles or 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.

Search

Chime Bank | Fidelity | Wells Fargo | Vanguard | Capital One | Citi | ENPOWER | Add real estate

Securely connect your Charles Schwab account to RBC Wealth Management via Yodlee.
After signing in to Charles Schwab, remember to select all of these boxes for the best experience:

- Select All
- Cash and investment accounts
- Automatically link new accounts

Continue (3)

By connecting you agree to Yodlee's Terms of Use, and that Yodlee may access, process, and share your data with RBC Wealth Management. Yodlee's use of account data follows RBC Wealth Management's Privacy Notice. LMBL0319
Secure data access by yodlee

- 3 If you cannot find an institution, you have the ability to add an account manually. Select “Add manually” from the list of tiles, select the account type, add an identifiable account name and the balance on the account. Click “Save and finish” to complete the manual account addition. This account balance is a point in time value that will need to be updated as needed.

Add manual account

Account type
Account type

Account name

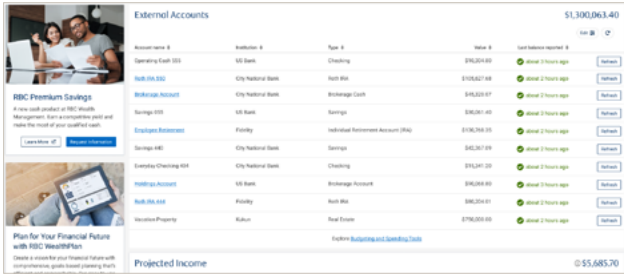
Next

For illustrative purposes only

Continued on page 2

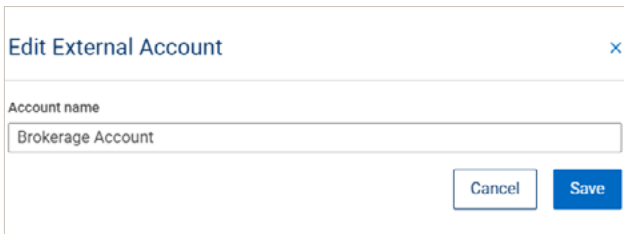
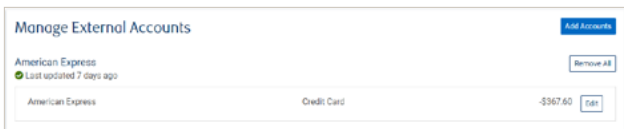
Investment and insurance products offered through RBC Wealth Management are not insured by the FDIC or any other federal government agency, are not deposits or other obligations of, or guaranteed by, a bank or any bank affiliate, and are subject to investment risks, including possible loss of the principal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

- 4 After completing setup, your Home page should refresh and your external account(s) will display in the External Account section.



Managing and reconnecting your external accounts

From the Wealth Management Online Home page in the External Accounts section, you can click “Edit” then 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 exclamation point box 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 dialog box that opens, follow the prompts to enter your username and password for the financial institution.

To change the name for your account, click “Rename”. Your updated account name will display only on RBC Wealth Management systems.

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.