

Simplify your life with Total Wealth



Wealth Management

Total Wealth brings your entire financial life together within RBC Wealth Management Online. By connecting your external accounts, you and your RBC Wealth Management financial advisor gain the clarity needed to build a more meaningful RBC WealthPlan®.

Discover your Total Wealth

Think of Total Wealth as the “big picture” view of your financial life. It is a secure, digital tool within your RBC online access account that brings all your finances together in one place—including accounts you have with other banks, investment firms, retirement providers and real estate. Instead of logging into multiple accounts, Total Wealth provides real-time balances at the click of a button.

What does it do for you?

When your Total Wealth is visible in one place, you and your financial advisor gain the clarity needed to make well-informed decisions for your long-term success.

Here's how it helps:

- **See everything at once:** choose from over 19,000 financial institutions to securely link 401(k)s, external bank and brokerage accounts, credit cards and mortgages
- **Know what your home is worth:** through our partnership with Kukun, you can see real-time valuations of your real estate, giving you a more accurate sense of your net worth

- **Watch your spending:** use our built-in spending tools to track daily household finances over multiple accounts
- **Track your progress:** your linked accounts sync automatically with your RBC WealthPlan
- **Always up to date:** enjoy the ability to refresh your balances on demand whenever you want a real-time check-in

Getting started is simple

You can find Total Wealth directly within [RBC Wealth Management Online](#) or through our mobile app.

1. Select External Accounts in the Your Total Wealth section
2. Add your institutions and enter your credentials through our secure portal
3. After completing setup, your Home page should refresh and your external account(s) will display in the External Account section

Privacy and support

Your security is our highest priority. Total Wealth is powered by Yodlee, a leading global provider of account aggregation, using industry-leading encryption to keep your data safe. You can view Yodlee's privacy policy at yodlee.com/legal/privacy-notice.

We're here to help

If you have questions or need a hand getting started our Client Support Services team is ready to assist. Call Client Support Services toll free at (800) 933-9946 weekdays from 8 a.m. to 10 p.m. (ET) and Saturdays from 10 a.m. to 6 p.m. (ET). If you have investment questions, contact your financial advisor.



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.