Client Access Registration Process and how to "Go Paperless"

Getting Started

Before registering for access, you will need to gather the "Client ID" of all accounts for which you want to request access. You can request access under the same user ID for multiple Client IDs related to all of your RGF Wealth Management Ltd. securities accounts.

The "Client ID" is the first five digits of your account number. You can either find the client ID in the upper right-hand corner of your statement or you can ask your advisory team.

Your Tax-Free Savings Statement

For the period ending September 30, 2015

Account number C09-ZX0K-0
SMITH JOHN

Registering for Access

1. From the www.rgfwealth.com website, please click the **My e-Statements** link at the top of the page or go directly to https://rgfwealth.raymondjames.ca.

2. Once the page loads, enter your email in the "Need Access? Please register" section to the right of the page. Then click Start.
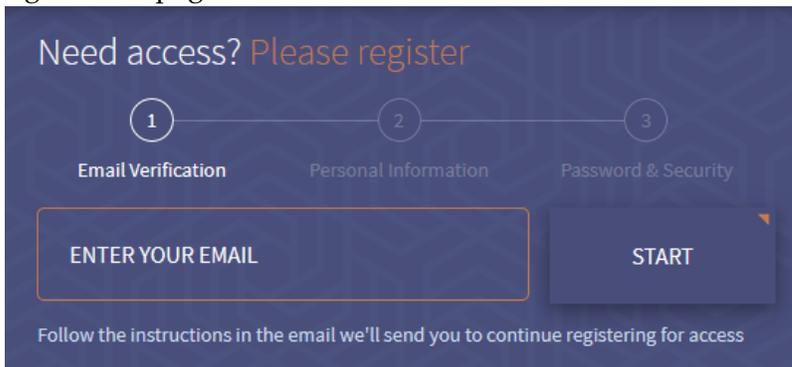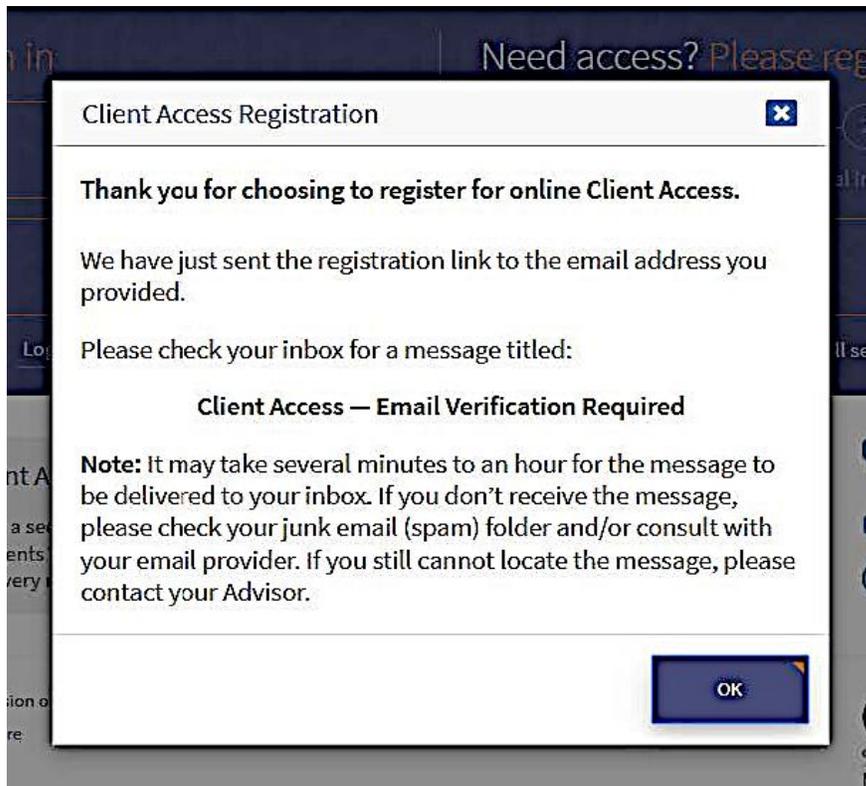
Need access? Please register

① Email Verification — ② Personal Information — ③ Password & Security

ENTER YOUR EMAIL   START

Follow the instructions in the email we'll send you to continue registering for access

3. You will get a pop-up asking you to check your email and verify your email address

Client Access Registration

Thank you for choosing to register for online Client Access.

We have just sent the registration link to the email address you provided.

Please check your inbox for a message titled:

Client Access — Email Verification Required

Note: It may take several minutes to an hour for the message to be delivered to your inbox. If you don't receive the message, please check your junk email (spam) folder and/or consult with your email provider. If you still cannot locate the message, please contact your Advisor.

OK

4. Once the email has been verified, you will enter your Registration details

5. Once you have entered your Personal Details and Your Advisor's Details, you will need to create a Username and enter your Client ID(s) (first 5 characters of your account number)

6. Agree to the Terms and Conditions then Click Next

7. Once your Registration request has been approved, you will receive an email

8. Click on "Continue Setting Up Access" in this email

9. Now you can create your password and enter your security Challenge Questions

Client Access Registration

Complete the sections below to finish setting up your Client Access.

| ① Email Verification | ② Personal Information | ③ Password & Security |

PASSWORD CREATION

Choose Your Password

••••••••••••••

[password strength bar - green]

Confirm Your Password

Password must:
- ✔ Be at least 0 characters in length
- ✔ Not contain your username / e-mail address
- ✔ Not contain the word 'password'
- ✔ Not repeat characters 3 or more times in sequence
- ✔ Contain a mix of uppercase and lowercase letters
- ✔ Contain one or more digits (numbers)
- ✔ Contain one or more symbols, such as:
  !?&@#5%^*/+-=#(){}[]<>'*.,:;

SECURITY CHALLENGE QUESTIONS

Security challenge questions provide you with a secondary method to identify yourself online. You may be asked to answer one or more questions before you can change your password or other information. Note: Your answers will be kept secret, just like your password.

Of the questions below, choose 3 or more that are:

- Easy for you to remember, even in the future
- One or two word answers
- Not going to change over time
- Nothing anyone else would know or easily guess
- Nothing shared on social media that can be looked up

Question 1

Your Answer to Question 1

10. Once you have entered your security questions, you can set up Two-Factor Authentication.

Going Paperless

Going Paperless means you will stop receiving a paper copy of your statements, confirmations and/or tax slips and will be notified via email when an electronic copy is available for download. To "Go Paperless" you need to change your delivery method from "Paper Delivery" to "Electronic Delivery", as illustrated below.

NOTE: The delivery method is controlled separately for statements, confirmations and tax slips and you can switch between the two options at any time. All accounts under the same Client ID must have the same delivery method, but if you have access to multiple Client IDs you can set the delivery method separately for each of them.

1. Once you have logged into the Client Access site, go to **MY PROFILE,** located on the menu bar.

2. Under **MY PROFILE,** you can select which document type you want to change your delivery method from the Document Settings grid

3. You can choose Electronic Delivery, where paper documents will no longer be mailed to you and you will receive email notifications when new documents are available. Documents can be downloaded and/or printed via the Client Access site. Or you can choose Paper Delivery, where paper documents will be sent by postal mail and no email notifications will be sent. Documents can still be downloaded and/or printed via the Client Access site.

4. If you would like all your documents to be Electronic Delivery or Paper Delivery, you can select your choice for All Documents. If you would like a combination of the two, select your choice for each. Click Save.