

Process Steps

This guide provides step-by-step instructions to users to download and retrieve their documents that are available digitally within the Investor Hub, and to update the document delivery preference for their documents.

Downloading and retrieving your documents within the Investor Hub

The Investor Hub supports the retrieval of statements, tax documents, and trade confirmations associated with your linked accounts.

To retrieve your documents follow the instructions below.

Step 1: After successfully logging into the Investor Hub select the **Documents** tab. The Investor Hub will load all the documents available to you.

Documents can be filtered based on:

- Firm
- Account Type (RSP, TFSA, etc)
- Ownership Type (Individual vs Entity)
- Accounts (Account number)
- Document Type (Confirm, Statement, Tax)

The screenshot shows the Investor Hub interface. At the top, there's a dark header with the 'INVESTOR HUB' logo and user settings (FR, a gear icon, and a logout icon). Below the header, a 'Welcome back!' message is displayed. A navigation bar contains 'Overview', 'Insights', and 'Documents' tabs, with 'Documents' being the active tab. Below the navigation bar, there are five filter dropdown menus: 'Firm', 'Account Type', 'Ownership Type', 'Accounts', and 'Document Type'. An 'Apply' button is below these filters, and a 'Clear all filters' link is below that. Below the filters, it says '0 selected of 123 results'. To the right of this, there is a 'Download selected documents' button with a download icon. Below this, there is a table with the following columns: 'Description', 'Date issued', 'Type', 'Firm', and 'Account number'. The table contains three rows of data, each with a checkbox in the 'Description' column.

Description	Date issued	Type	Firm	Account number
☐ Trade Confirmation Document	XXXX-XX-XX	Confirm	Firm Name	123456
☐ Tax Document	XXXX-XX-XX	Tax	Firm Name	123456
☐ Statements	XXXX-XX-XX	Statement	Firm Name	123456

Step 2: To view a document, click on the name of the document within the **Description** column. This will open the document in a new tab.

Step 3: To download the document or to download multiple documents, select the checkboxes next to the **Description** and then select the **Download selected documents** button. This will download the files to your device.

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Welcome back!

OverviewInsightsDocuments

Firm

Account Type

Ownership Type

Accounts

Document Type

Apply

Clear all filters

2 selected of 123 results

Download selected documents ⬇️

	Description	Date issued	Type	Firm	Account number
☒	Trade Confirmation Document	XXXX-XX-XX	Confirm	Firm Name	123456
☒	Tax Document	XXXX-XX-XX	Tax	Firm Name	123456
☐	Statements	XXXX-XX-XX	Statement	Firm Name	123456

Updating your document delivery preferences

Step 1 : Log into the Investor Hub, and navigate to the **Settings** page by clicking the gear icon at the top right of the page.

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Step 2: Navigate to the **Communication** section of the **Settings** page, and select **eServices**.

Communication

eServices >

Step 3: Within the eServices page, all client IDs are listed with the document types available to the accounts under the client ID. The document types may change based on the documents available.

Delivery preferences can be updated to one of the following:

- Paper
- Digital
- Paper and Digital

The option the delivery preference is currently set to will be the default selection. To change the delivery preference select the preferred option and press **Save** under the document types.

Saving the document delivery preference will update the delivery preference for all accounts under the client ID.

If the changes are not saved then the delivery preference will not be updated.

The screenshot shows the 'eServices' page in the 'INVESTOR HUB'. The breadcrumb trail is 'Home > Settings > eServices'. The page title is 'eServices'. Below the title, the 'Firm Name' is displayed as 'Client ID A1B2C3¹'. The main content area is a form with three sections, each with a heading and three radio button options: 'Paper', 'Digital', and 'Paper and Digital'. The 'Tax Documents' section has 'Digital' selected. The 'Trade Confirmations' section has 'Paper and Digital' selected. The 'Statements and Reports' section has 'Paper and Digital' selected. A 'Save' button is located at the bottom left of the form.

Document Type	Paper	Digital	Paper and Digital
Tax Documents	☐	☒	☐
Trade Confirmations	☐	☐	☒
Statements and Reports	☐	☐	☒

Save