eServices

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

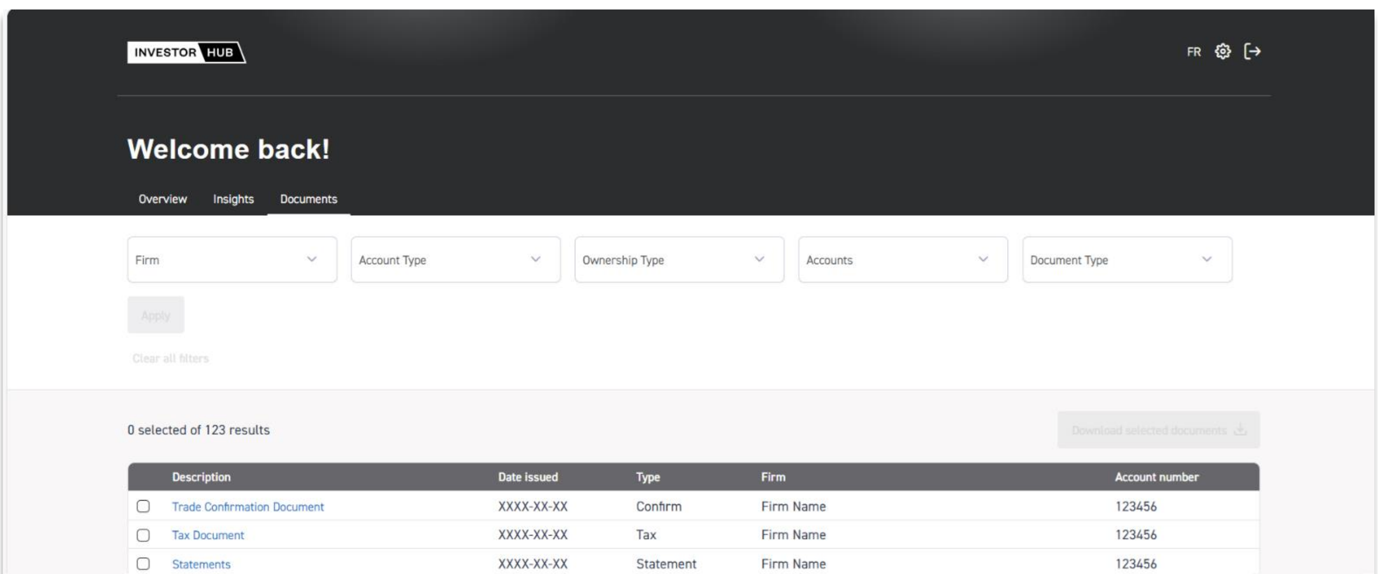
The Investor Hub supports the retrieval of statements, tax documents, and trade confirmations associated with your linked accounts.

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.

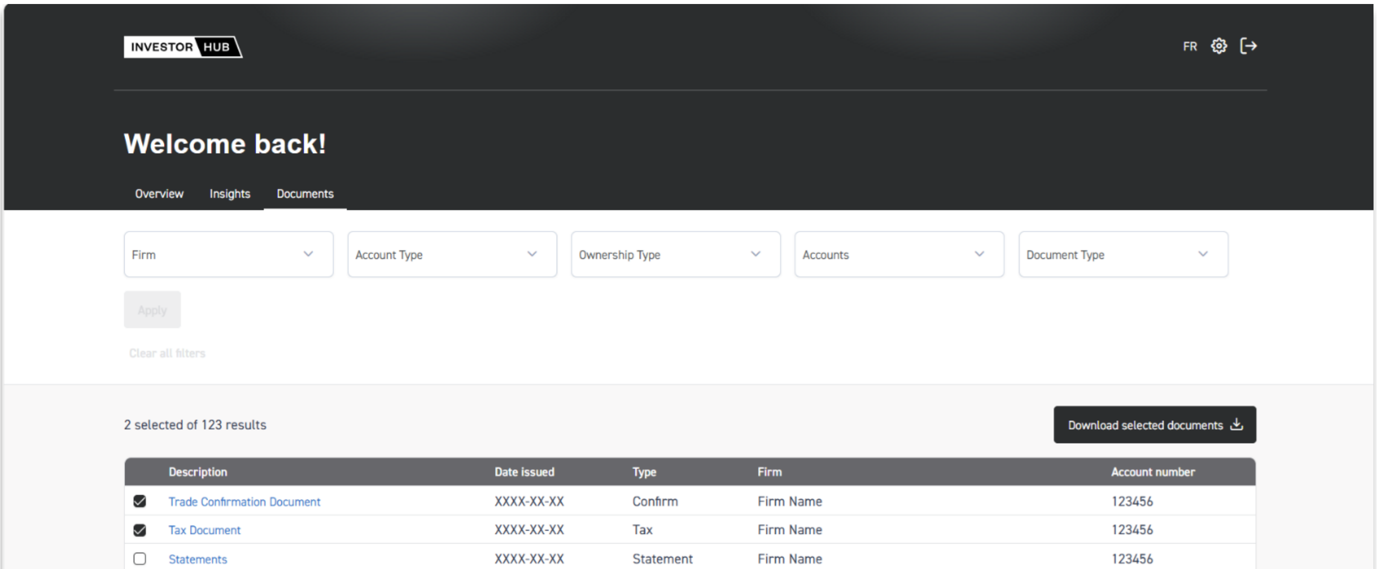
Documents can be filtered based on:

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



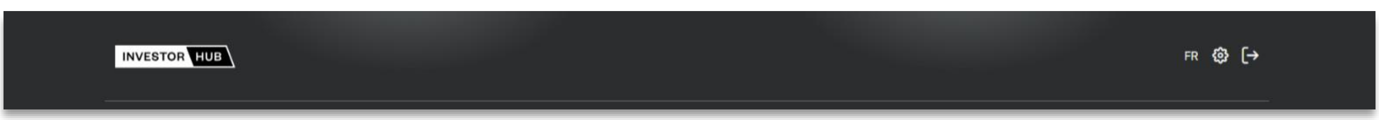
Step 2: To view a document, click on the name of the document within the **Description** column. This will open the document in a new tab.

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.

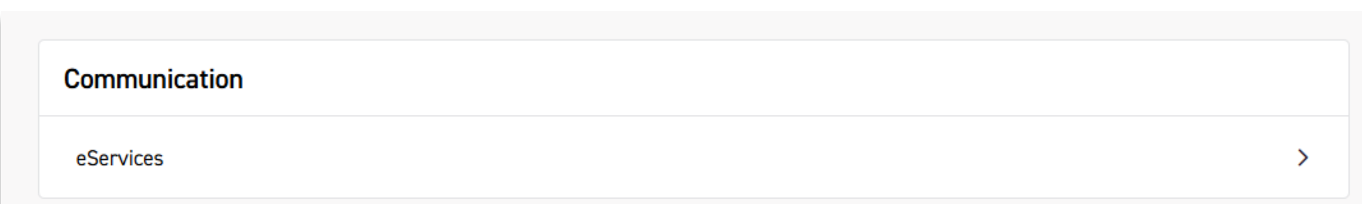


Updating your document delivery preferences

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.



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