Linking Your Wealth Management Accounts



Through Mobile Banking App:

- 1. Sign in to online banking on your mobile app.
- 2. Navigate to 'Accounts' and click on 'Link account' under 'Wealth management accounts'.
- 3. Click 'Link Account' and select either Aviso Wealth, Qtrade Investor, or Qtrade Guided Portfolios.
- 4. Enter your details (Client ID, last name, and postal code) and click 'Continue'.
- 5. Review the information you've provided.
- 6. Click 'Continue'.
- 7. You will receive a one-time passcode either to your email or a text message. Enter the OTP and click 'Continue'.
- 8. The wealth management account is now linked.
- 9. Repeat steps 2-7 to link other wealth management accounts.



Through Online Banking:

- 1. Sign in to online banking on a desktop computer or tablet.
- 2. Navigate to 'Accounts' and click on 'Wealth management accounts'.
- 3. Click 'Link Account' and select either Aviso Wealth, Qtrade Investor, or Qtrade Guided Portfolios.
- 4. Enter your details (Client ID, last name, and postal code) and click 'Continue'.
- 5. Review the information you've provided.
- 6. Click 'Continue'.
- 7. You will receive a one-time passcode either to your email or a text message. Enter the OTP and click 'Continue'.
- 8. The wealth management account is now linked.
- 9. Repeat steps 2-7 to link other wealth management accounts.

