



ONLINE ACCOUNT ACCESS: YOUR USER GUIDE

.....
access to your portfolio – anytime, anywhere



ONLINE ACCOUNT ACCESS: INTRODUCTION

Richardson GMP Limited realizes the importance of having access to accurate and timely information. Online Account Access (OAA) is an online information centre available to clients seven days a week, 24 hours a day providing electronic access to account details, history, research, quotes and charts.

This guide will provide details on how to use Online Account Access and the features available. An FAQ (Frequently Asked Questions) section can be found [on page 15](#) for more information.

OAA benefits include the ability to:

PAGE

- 4 [View your portfolio holdings in real time](#)
- 8 [View consolidated account positions based on multiple accounts](#)
- 4 [View securities valued at previous day's last close price, matching client statements. Ability to select previous day's last bid price](#)
- 10 [Access to GMP Securities Research reports and commentaries](#)
- 13 [View quotes on mutual funds, equities and options, and charts on equities](#)
- 12 [View Watchlists based on current portfolio holdings](#)
- 12 [Create and customize your own Watchlists](#)
- 5 [View and download statements online - including the ability to suppress mailing of your paper statement](#)

1 Online Reading

For your convenience, this document is interactive for online viewing. Please use the arrows below to navigate through the pages or click on underlined text to jump to that page.

MY ACCOUNTS

The screenshot shows the 'My Accounts' page with the following elements:

- 1 Navigation Bar:** Located at the top left, containing links for MY ACCOUNTS, MY PROFILE, RESEARCH, MARKET DATA, and RESOURCES.
- 2 Information Highlights:** A section with 'Messages & Education' and 'News & Highlights' containing various articles and reports.
- 3 Quotes & Watchlists:** A section with a 'Select a Watchlist' dropdown (set to 'All Accounts'), a 'Stock Quote' input field (set to 'CDN Equity'), and a 'Symbol Lookup' button.
- 4 Consolidated Account Overview:** A dropdown menu labeled 'View Consolidated Position & Finance Summary'.
- 5 Portfolio Asset Class:** A pie chart showing the distribution of assets across classes: Cash, Equities, Fixed Income, Income Trusts, Mutual Funds, Options, Other, and Preferred Shares.
- 6 Valuation Options:** Radio buttons for 'Valuation based on previous day's Close Price' (selected) and 'Last Bid Price'.
- 7 Account Overview:** A table listing accounts with columns for Account, Account Nickname, Cash, Securities, and Total Assets. Each row includes a 'View Details' dropdown menu.

Account	Account Nickname	Cash	Securities	Total Assets
DEFAULT				
	Margin Long USD	USD	0.00	0.00
	TFSA	CAD	310.06	18,058.40
	Margin Long CAD	CAD	100.34	60,338.18
	RRSP	CAD	1,594.31	209,716.67
	LRSP/IRA	CAD	0.45	511.15
	Total Default	CAD	2,005.16	288,624.40
	Total Default	USD	0.00	0.00
MY NON REGISTERED				
	Margin Long USD	USD	73.56	4,323.54
	Total My Non-Registered	CAD	537.62	140,882.46
	Total My Non-Registered	USD	73.56	4,323.54
	Total CAD	CAD	2,542.70	429,506.86
	Total USD	USD	73.56	4,323.54
	TOTAL CAD	CAD	2,613.00	433,634.11

1 Navigation Bar
The navigation bar exists on the top left of each page for easy access to the main sections of OAA: **My Accounts, My Profile, Research, Market Data** and **Resources**.

2 Information Highlights
This section contains timely news and information.

3 Quotes & Watchlists
This section allows you to request a quote on any Canadian or U.S. equity or option and end of day pricing for Canadian mutual funds and charts for equities. This section also allows you to monitor existing holdings and track an unlimited number of Watchlists.

4 Consolidated Account Overview
Use the drop down menu to view consolidated holdings in your account groups or all accounts.

5 Portfolio Asset Class
The pie chart allows you to view how your overall portfolio is structured by asset class.

6 Valuation Options
View security pricing based on previous day's closing price or previous day's last bid price.

7 Account Overview
You will find detailed information on each account with asset breakdown by account. For a detailed view of transaction history and daily account valuations, click on the corresponding **View Details** drop down menu.

VIEW DETAILS

My Accounts
Balances as of April 26, 2011

Select a Watchlist: All Accounts
Stock Quote: CDN Equity

Asset Classes

View Consolidated Position & Balance Summary:

Expand all Collapse all

Valuation based on previous days
 Close Price Last Bid Price

Account	Account Nickname		Cash	Securities	Total Assets	
DEFAULT						
	Margin Long USD	USD	0.00	0.00	0.00	View Details
	TFSA	CAD	310.06	18,058.40	18,368.46	View Details Position & Balance Statements Transactions Documents View Details
	Margin Long CAD	CAD	100.34	60,338.18	60,438.52	
	RRSP	CAD	1,594.31	209,716.67	211,310.98	
	LRSP/LIRA	CAD	0.45	511.15	511.60	View Details
	Total Default	CAD	2,005.16	288,624.40	290,629.56	
	Total Default	USD	0.00	0.00	0.00	

1 View Details

Use the drop down menu to select a precise overview of your **Position & Balance, Statements, Transactions** and **Documents** (including tax-related information) for your account.

VIEW DETAILS: POSITIONS & BALANCES

Switch View: **Position & Balance** 1

- Position & Balance
- Statements
- Transactions
- Documents

Prev Day's Close

Last Bid Prices

Price	Market Value	Gain/Loss
0.0000	0.00	0.00
	0.00	0.00
	0.00	0.00

1 Switch view

You can toggle between the **Position & Balance, Statements, Transactions and Documents** using the **Switch View** drop down menu.

Account Overview

Balances as of April 28, 2011

Select a Watchlist: My Watchlist

Stock Quote: CDN Equity

Account	Margin Long CAD
Trade Date Cash Balance	100.34
Settlement Date Cash Balance	100.34
Securities	60,614.18
Total Assets	60,714.52
Margin Available	31,835.54
Loan Value	31,735.20

Asset Classes

Switch View: **Position & Balance**

2 Prev Day's Close Refresh Prices 3

Last Bid Prices are as of 2011-04-27 16:00 EST

Description	Symbol	Quantity	Book Value	Price	Market Value	Gain/Loss
CASH & CASH EQUIVALENTS						
Cash		0.0000	100.34	0.0000	100.34	0.00
TOTAL CASH & CASH EQUIVALENTS			100.34		100.34	0.00
EQUITIES						
CRESCENT POINT ENERGY CORP	CPG	200.0000	7,535.20	43.2000	8,640.00	1,104.80
GRT WST LIFECO INC	GWO	300.0000	9,453.00	26.9400	8,082.00	-1,371.00
NAL ENERGY CORP	NAE	800.0000	7,806.00	12.0000	10,128.00	2,322.00
SUN LIFE FNCL INC	SLF	600.0000	27,027.00	30.8100	18,486.00	-8,541.00
US SILVER CORP	USA	19,000.0000	13,380.00	0.7000	13,300.00	-80.00
TOTAL EQUITIES			65,251.20		58,636.00	-6,615.20
MUTUAL FUNDS						
PANORAMA PRIV FD S1/0 F-NL	FPG100	105.1226	1,000.00	18.8178	1,978.18	978.18
TOTAL MUTUAL FUNDS			1,000.00		1,978.18	978.18
TOTAL			66,351.54		60,714.52	-5,637.02

2 Pricing Valuation

View security pricing based on previous day's close or previous day's last bid. For current market prices (20 minute delay), press the **Refresh Prices** button.

3 Pricing Note

This line indicates if you are viewing previous day's close or previous day's last bid.

5 Position & Balance Summary

Expand all Collapse all

5 Positions & Balances

Check the value of your investments at your convenience.

4 Detailed Quote

Click on the security symbol to view a detailed quote and chart.

VIEW DETAILS: STATEMENTS

Account Overview

Balances as of May 2, 2011

Select a Watchlist: My Watchlist
Stock Quote: CDN Equity

Account 40F RRSP Asset Management Account	
Trade Date Cash Balance	1,594.31
Settlement Date Cash Balance	1,594.31
Securities	208,142.28
Total Assets	209,736.59

Asset Classes

- Cash
- Equities
- Fixed Income
- Income Trusts
- Mutual Funds
- Options
- Other
- Preferred Shares

Statements 1

Expand all Collapse all

Date	Name
STATEMENTS	
Mar 2011	Statement - Account 40F
Feb 2011	Statement - Account 40F
Jan 2011	Statement - Account 40F
Dec 2010	Statement - Account 40F
Nov 2010	Statement - Account 40F
Oct 2010	Statement - Account 40F
Sep 2010	Statement - Account 40F
Aug 2010	Statement - Account 40F
Jul 2010	Statement - Account 40F
Jun 2010	Statement - Account 40F
May 2010	Statement - Account 40F
Apr 2010	Statement - Account 40F
Mar 2010	Statement - Account 40F

Switch View: Statements 2

- Position & Balance
- Statements**
- Transactions
- Documents

2 Switch View
You can toggle between the **Position & Balance**, **Statements**, **Transactions** and **Documents** using the **Switch View** drop down menu.

NOTE
You have the option to suppress mailing of your paper statements. See [page 17](#) for more information.

1 E-Statements
When you click **Statements** in the **View Details** drop down menu, you can easily access your account e-statements 24/7.

VIEW DETAILS: TRANSACTIONS

Account Overview

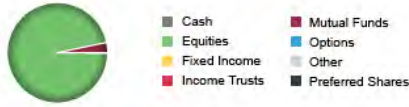
Balances as of April 26, 2011

Account	Margin Long CAD
Trade Date Cash Balance	100.34
Settlement Date Cash Balance	100.34
Securities	60,338.18
Total Assets	60,438.52
Margin Available	31,775.34
Loan Value	31,675.00

Select a Watchlist: All Accounts

Stock Quote: CDN Equity [Symbol Lookup](#)

Asset Classes



Transaction History

[Expand all](#) [Collapse all](#)

Settlement Date	Date Processed	Quantity	Activity	Description	Transacted Price	Net Amount
TRANSACTIONS						
2011-04-18	2011-04-18	0	Ama Fee	AMA FEE 03/2011	0.0000	-346.21
2011-04-18	2011-04-18	0	Hst	HST FOR FEE ACCT:40F	0.0000	-45.02
2011-04-15	2011-04-15	200	Cdn Cash Div	CRESCENT POINT ENERGY CORP	0.0000	46.00
2011-04-15	2011-04-15	800	Cdn Cash Div	NAL ENERGY CORP	0.0000	56.00
2011-03-31	2011-03-31	600	Cdn Cash Div	SUN LIFE FNCL INC	0.0000	216.00
2011-03-31	2011-03-31	300	Cdn Cash Div	GRT WST LIFECO INC	0.0000	92.25
2011-03-15	2011-03-15	800	Cdn Cash Div	NAL ENERGY CORP	0.0000	56.00
2011-03-15	2011-03-15	200	Cdn Cash Div	CRESCENT POINT ENERGY CORP	0.0000	46.00
2011-02-23	2011-02-17	-5,000	Sell	STARFIELD RES INC	0.1150	575.00
2011-02-23	2011-02-17	-60,000	Sell	WT-NEW GOLD INC WT 03APR12	0.0600	3,600.00
2011-02-23	2011-02-17	9,000	Buy	US SILVER CORP	0.5200	-4,680.00
2011-02-15	2011-02-15	800	Cdn Cash Div	NAL ENERGY CORP	0.0000	56.00
2011-02-15	2011-02-15	200	Cdn Cash Div	CRESCENT POINT ENERGY CORP	0.0000	46.00
2011-01-19	2011-01-19	0	Hst	HST FOR FEE ACCT:40F	0.0000	-42.52

Switch View: Transactions

2 Switch View
You can toggle between the **Position & Balance, Statements, Transactions** and **Documents** using the **Switch View** drop down menu.

1 Transaction History
View your detailed transaction history.

6

[RETURN TO INTRODUCTION](#)

VIEW DETAILS: DOCUMENTS

Account Overview

Balances as of April 26, 2011

Select a Watchlist: All Accounts
Stock Quote: CDN Equity

Account	Margin Long CAD
Trade Date Cash Balance	100.34
Settlement Date Cash Balance	100.34
Securities	60,338.18
Total Assets	60,438.52
Margin Available	31,775.34
Loan Value	31,675.00

Asset Classes

- Cash
- Equities
- Fixed Income
- Income Trusts
- Mutual Funds
- Options
- Other
- Preferred Shares

Documents

Expand all Collapse all

What is your mother's maiden name?

Go

Switch View: Documents

1

1 Security

NOTE: For more information on accessing your documents, please see [page 16](#) or [click here](#).

2

2 Documents

View tax slips and other account-related documentation. This area requires a security question to be answered for further protection.

3

3 Switch View

You can toggle between the **Position & Balance, Statements, Transactions** and **Documents** using the **Switch View** drop down menu.

Documents

Expand all Collapse all

Date	Type
01/02/2013	Tax Forms

Closed Accounts:

Date	Type
03/18/2012	Tax Forms
03/18/2012	Tax Forms
02/28/2012	Tax Forms
02/18/2012	Tax Forms
02/18/2012	Tax Forms
02/15/2012	Tax Forms

Switch View: Documents

4

4 Closed Accounts

View tax slips and other related documents for accounts which have been closed by selecting the account from the drop down menu.

CONSOLIDATED ACCOUNT OVERVIEW

1 View Consolidated Accounts: All Accounts

2 All Accounts

3 View Account: [Dropdown]

Consolidated Overview in CAD

Balances as of April 28, 2011

Select a Watchlist: My Watchlist

Stock Quote: [Input] CDN Equity

Asset Classes

- Cash
- Equities
- Fixed Income
- Income Trusts
- Mutual Funds
- Options
- Other
- Preferred Shares

Position & Balance Summary

Expand all Collapse all

Prev Day's Close Refresh Prices

Last Bid Prices are as of 2011-04-27 10:00 EST

Description	Symbol	Quantity	Book Value	Price	Market Value	Gain/Loss
CASH & CASH EQUIVALENTS						
Cash		0.0000	2,612.89	0.0000	2,612.89	0.00
MANU BK INVS SVGS ACCT CL F NL	MIP810	10,242.0000	10,242.00	1.0000	10,242.00	0.00
MANU BK SUS IN SGS ACT CL F NL	MIP811	4,274.3300	4,082.32	1.0000	4,274.33	212.01
B2B HIGH INT INVEST CL F NL	BTB101	18,962.6900	18,962.69	1.0000	18,962.69	0.00
TOTAL CASH & CASH EQUIVALENTS			35,879.70		35,879.70	0.00
EQUITIES						
ALGONQUIN POWER & UTILITIES	APN	2,000.0000	9,980.00	5.1700	10,340.00	380.00

Consolidated Account Overview

Choose to view consolidated balances for all accounts or for your account groups itemized by asset class. Please note that all account holdings are converted to CAD dollars.

View Additional Account Details

Click on the plus sign to show a list of all accounts included in this consolidated view.

3 View Additional Accounts

Use this drop down menu to view different individual accounts.

MY PROFILE

CONTACT US | LOGOUT | FRANÇAIS

RICHARDSON GMP

MY ACCOUNTS | **MY PROFILE** | RESEARCH | MARKET DATA | RESOURCES

1 - MY ADVISOR

JOHN ADVISOR
Business Number : 900-000-0002
Fax Number : 900-000-0002
Email Address : John.Advisor@RichardsonGMP.com

JANIE ADVISOR
Business Number : 900-000-0003
Fax Number : 900-000-0002
Email Address : Jane.Advisor@RichardsonGMP.com

TEAM:

Name	Business Number	Email Address
Joe Assistant	900-000-0004	Joe.Assistant@RichardsonGMP.com

2 - MY SECURITY OPTIONS

User Name : 10003

Secret Question : What is your mother's maiden name?

Timeout from Site : 20 minutes

Email Address : John.Clients@gmail.com

3 - ACCOUNT GROUPS

Group Name

My Non-Registered

My Registered

4 - ACCOUNT NICKNAMES

Account Nickname	Account Number	Short Name	Type	Group	Currency
Travel Money			Margin Long CAD	My Non-Registered	CAD
Trading			Margin Long USD	Default	USD
			TFSA	Default	CAD
Retirement			Margin Long CAD	Default	CAD
			Margin Long USD	My Non-Registered	USD
			RRSP	Default	CAD
			LRSP/LIRA	Default	CAD

5 - STATEMENT DELIVERY OPTIONS

Client Name	Delivery Type	Last Changed
	Electronic	05/17/2010
	Electronic	02/07/2010
	Electronic	09/29/2009

6 - DEFAULT WATCHLIST

My Watchlist

7 - PRICING OPTIONS

Market Value based on previous day's

Closing Price Last Bid Price

1 Access My Profile

Go to **My Profile** by clicking on the top navigation.

2 Your Investment Advisor

View your Investment Advisor & Team's contact information here.

3 Change Security Question

Change your security question and password for accessing your account statements and documents. Please [see page 16](#) for more information.

4 Timeout Preferences

Choose the number of minutes to timeout inactive sessions. Default is 20 minutes.

5 Account Groups

Use this utility to organize your accounts into groups. Please [see page 18 by clicking here](#) for more information.

6 Account Nicknames

Use this utility to rename your accounts for easy reference. Please [see page 18 by clicking here](#) for more information.

7 Statement Delivery Options

You have the option of receiving your statements in the mail or electronically via OAA. Please [see page 17](#) for more information.

8 Default Watchlist & Pricing Options

Set your default Watchlist and pricing options for your accounts. Please [see page 21](#) for more information.

RESEARCH

1 Research
The **Research** page gives you access to daily research reports and commentary from GMP Securities. GMP Securities covers over 230 companies and offers research on Canadian and U.S. listed equities and investment funds.

2 Research Report
Click on the title to see the full report.

3 Research Analyst
Click on an author's name to see all reports written by a specific analyst.

The screenshot shows the Richardson GMP Research page. At the top is the Richardson GMP logo and a navigation menu with 'RESEARCH' highlighted. Below is the 'Richardson GMP Research' header with a watchlist selector. The main content area features the GMP Securities logo and a navigation bar. Under 'Today's Research', there are filters for 'Today's Research', '7-Day Research', '30-Day Research', and 'All Research'. A table lists research reports with columns for 'Posted', 'Title', 'Author', and 'Actions'. Callouts point to the 'RESEARCH' menu item, a report title ('Oil & Gas Producers'), and an author name ('Peter Nicol').

Posted	Title	Author	Actions
04/26/11	Real Estate Sector	Jimmy Khing Shar	Save Document More On This Company
04/26/11	At the Opening package	Research Department	Save Document More On This Company
04/26/11	Oil & Gas Producers	Oil & Gas Team	Save Document More On This Company
04/26/11	Falkland Oil and Gas	Peter Nicol	Save Document More On This Company
04/26/11	Barrick Gold Corp.	George Albino	Save Document More On This Company
04/26/11	Real Estate Sector	Jimmy Khing Shar	Save Document More On This

MARKET DATA

The screenshot shows the Richardson GMP website's Market Data section. At the top, there is a navigation bar with 'CONTACT', 'LOGOUT', and 'FRANCAIS'. Below this is the Richardson GMP logo and a main navigation menu with 'MY ACCOUNTS', 'MY PROFILE', 'RESEARCH', 'MARKET DATA', and 'RESOURCES'. The 'MARKET DATA' link is highlighted with a red circle and the number '1'. Below the navigation is the 'Market Data' heading, followed by a 'Select a Watchlist' dropdown set to 'My Watchlist' and a 'Stock Quote' dropdown set to 'CDN Equity'. A red circle with the number '2' points to the 'Market Data' heading. The main content area is divided into two columns. The left column, titled 'MARKET DATA', contains a table of indices and a table of currencies. A red circle with the number '4' points to the index table. The right column, titled 'MY WATCHLIST', contains a table of individual stock symbols. A red circle with the number '3' points to this table. At the bottom of the page, there are four line charts: 'TSX Daily .GSPTSE (Line)', 'NASDAQ Daily .JXIC (Line)', 'VENTURE Daily .SPCDNK (Line)', and 'S&P 500 Daily .GSPC (Line)'. A red circle with the number '4' points to the TSX chart.

Index	Last	Change
S&P TSX COMP. IND.	13,878.83	-15.57
S&P TSX VENT. GMP	2,200.90	4.08
S&P 500 INDEX	1,382.15	1.87
NASDAQ COMPOSITE	2,870.84	-1.89

Market data provided by Reuters. It is delayed 20 mins or more.

Currency	Last	Change
CAD	0.9451	-0.0056
AUD	1.0900	0.0041
EUR	1.4030	0.0005
GBP	1.8708	0.0072
JPY	81.0700	-0.4800
SEK	8.0301	0.0231
USD	0.8101	0.0079

Symbol	Price	Change
BCE.TO	\$35.78	\$0.10
GOOG.O	\$540.73	\$2.76
PPL.TO	\$0.23	\$0.02

1 Access Market Data

Go to **Market Data** by clicking on the top navigation.

2 View Timely Market Data

View and track the latest changes on the key North American exchanges.

3 Your Watchlist

Your default Watchlist will always appear on your **Market Data** page. Please [see page 21](#) for more information.

4 Index & Currency

Click on an index or individual currency to view more details.

WATCHLIST DETAILS

Messages & Education

News & Highlights

My Accounts

Balances as of April 26, 2011

Asset Classes

- Cash
- Equities
- Fixed Income
- Income Trusts
- Mutual Funds
- Options
- Other
- Preferred Shares

1 Access Your Watchlist

You can access your Watchlists from the **Select a Watchlist** drop down menu. Click on the orange arrow to go to the Watchlist.

My Accounts

Balances as of April 28, 2011

Asset Classes

Select a Watchlist: My Watchlist

View Consolidated Position & Balance Summary

2 Create Your Own Watchlist

Select **New** from the drop down menu to create your own customized Watchlist. You will then have the option of adding unlimited holdings to the Watchlist. Click on the orange arrow to start. Please [see page 20](#) for more information.

4 View Your Watchlist

From the **Watchlist Details** page you can view and modify the securities listing of any of your Watchlists.

3 Select a Watchlist

Use this drop down menu to create your own customized Watchlists or view a watchlist for your own accounts or account groups. Selecting **All Accounts** will produce a Watchlist of all the securities in your accounts. Please [see page 19](#) for more information.

Watchlist Details

Select a Watchlist: My Watchlist

Symbol	Description	Last Price	Volume	Time	Open	High	Low	Change	Tick	Bid	Size	Ask	% Change
BCE.TO	BCE INC	\$35.17	1,231,881	2:40	\$35.33	\$35.43	\$35.07	\$-0.12	▼	\$35.16	21	\$35.17	-0.34
GOOG.O	GOOGLE	\$537.75	1,430,884	2:39	\$538.06	\$539.25	\$534.08	\$-0.01	▼	\$537.75	1	\$537.87	0.00
PMU.TO	PACIFIC RIM MNG	\$0.22	55,500	1:14	\$0.21	\$0.22	\$0.21	\$0.01	▲	\$0.21	100	\$0.22	2.38

QUOTE DETAILS

1 Access Quote Details

Enter a symbol and the appropriate asset class in the **Stock Quote** input box and click on the orange arrow for details. You can use the **Symbol Lookup** feature to search a security by name.

Symbol	Description	Last Price	Volume	Time	Open	High	Low	Change	Tick	Bid	Size	Ask	% Change
BCE	BCE INC	\$35.17	1,234,731	2:41	\$35.33	\$35.43	\$35.07	\$-0.12	▼	\$35.17	23	\$35.18	-0.34

2 Quote Lookup

Enter a symbol to search for a quote on any Canadian or U.S. equity or option and end of day pricing for Canadian mutual funds and charts for equities. Quote details will open in a separate window.

3 Add Symbol to Watchlist

To add the symbol to your Watchlist, click on the drop down menu to select your preferred Watchlist. Then click **Add** and it will be automatically added.

4 Viewing Options

This feature allows you to change your chart options.

RESOURCES

The screenshot shows the Richardson GMP website interface. At the top right, there are links for CONTACT US, LOGOUT, and FRANÇAIS. The main navigation bar includes MY ACCOUNTS, MY PROFILE, RESEARCH, MARKET DATA, and RESOURCES. A red circle with the number '1' points to the RESOURCES link. Below the navigation bar, the 'Resources' section is highlighted with a red circle and the number '2'. The page content is organized into three main sections: Messages & Education, Help Centre, and News & Highlights. The News & Highlights section contains a list of reports and news items, each with a PDF icon. Callout boxes provide instructions on how to access the Resources section and how to view the news items.

1 Access Resources

Click on **Resources** from the top navigation to access this section.

2 Resources

View timely messages, reports, and news by simply clicking on the links.

FAQ - FREQUENTLY ASKED QUESTIONS ONLINE ACCOUNT ACCESS

Please click on the question below for more information.

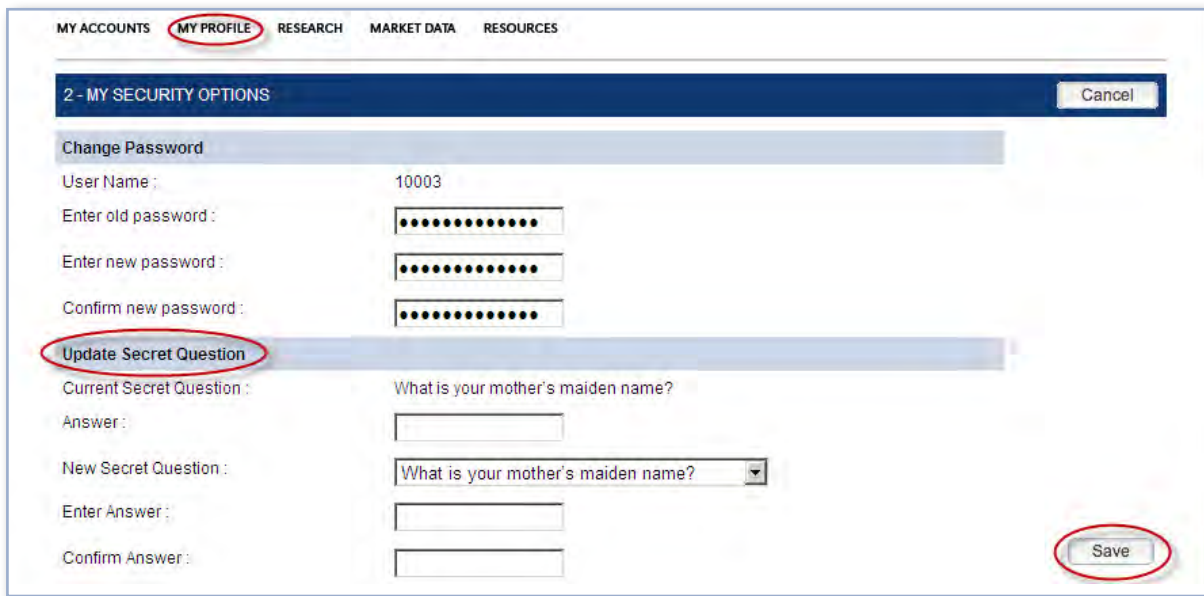
PAGE

- 16 [How do I access my account-related documents \(including tax reporting\)?](#)
- 17 [How do I suppress mailing of my paper statements?](#)
- 17 [What do I do if I forget my password?](#)
- 18 [What are Account Groups and how do I assign my accounts to different groups?](#)
- 18 [How do I apply Nicknames to my accounts?](#)
- 19 [How do I view a Watchlist based on my account holdings?](#)
- 20 [How do I create a customized Watchlist?](#)
- 21 [How do I set defaults for a Watchlist and Pricing Options?](#)
- 21 [How do I set up my Online Account Access profile so that my spouse and I can see each other's account information?](#)
- 21 [How do I suppress my spouse's paper statements?](#)

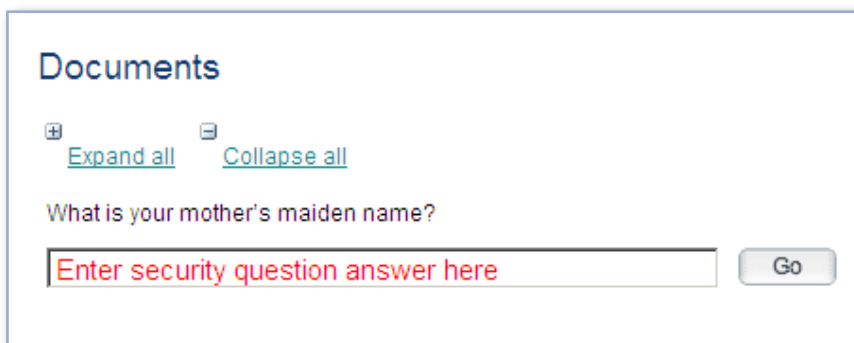
FAQ - ONLINE ACCOUNT ACCESS

How do I access my account-related documents (including tax reporting)?

To provide additional security, documents are protected by a personal security question. To set and save a **security question**, you will need to go to the [My Profile](#) section of Online Account Access.



Once completed, you can go back to the [Documents](#) section and enter the answer when prompted. If you forget your security answer, please call your Investment Advisor to have it reset.



FAQ - ONLINE ACCOUNT ACCESS CONT.

How do I suppress mailing of my paper statements?

From [My Profile](#), use the **Edit** button to access the option to change statement delivery methods.

5 - STATEMENT DELIVERY OPTIONS			
Client Name	Delivery Type	Last Changed	Options
A. Client	Electronic	05/17/2010	Change

Follow prompts through steps 1-3.

Change Statement Options - Step 1 of 3

Client Name : A. Client

Account(s) : 400 XXXX E - 400
 400 XXXX F - Option/Margin US
 400 XXXX J - TFSA
 40F XXXX E - Option/Margin CDN
 40F XXXX F - Option/Margin US
 40F XXXX R - RRSP
 40F XXXX V - LCKD

Last Changed : 05/17/2010 10:39:05 AM

Change Option : I will receive electronic statements via RGMP's Online Account Access
 I will receive paper statements with duplicates via RGMP's Online Account Access

[Continue](#) [Cancel](#)

What do I do if I forget my password?

If you forget your password, please contact your Investment Advisor and they will reset your password for you. Please note that you will not receive an email confirming this change. Your Advisor will simply let you know your new password over the phone. You can then go to the [My Profile](#) section of your account access and change it to your preference.

FAQ - ONLINE ACCOUNT ACCESS CONT.

What are Account Groups and how do I assign my accounts to different groups?

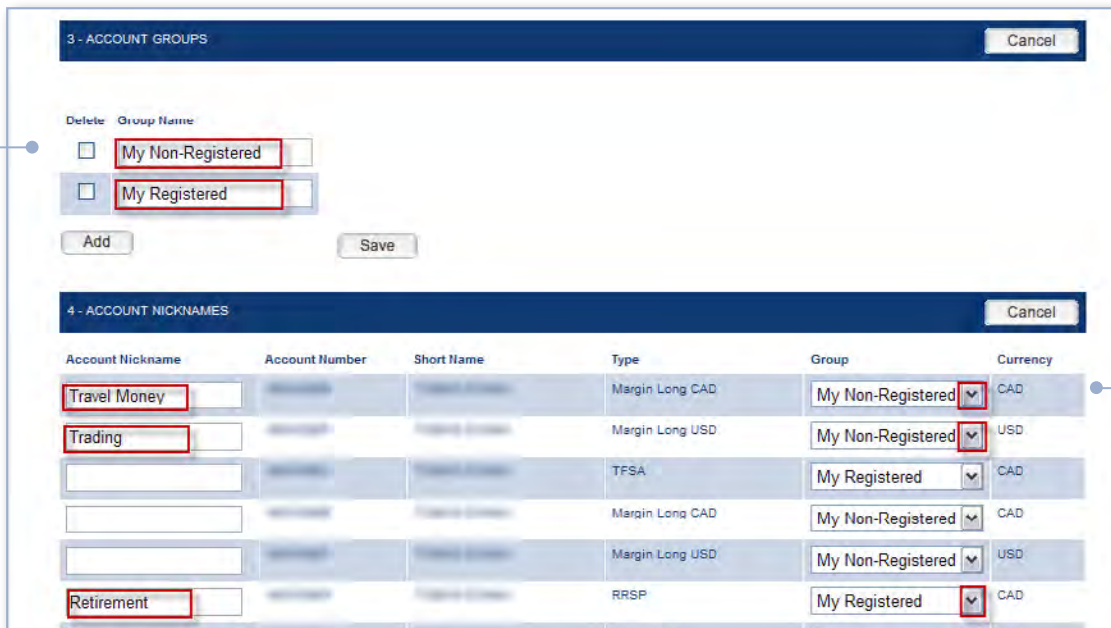
Creating **Account Groups** is a great way to customize your Online Account Access and organize your accounts. For example, if you have an RRSP, a spousal RRSP and a LIRA, you can create an **Account Group** called 'My Registered' and add these accounts to that group.

Account Groups are used throughout OAA in a number of different ways:

1. **Accounts are organized by Account Groups on the [My Accounts](#) page.**
2. **Accounts within a group can be viewed from a consolidated perspective. [See page 8 for more information.](#)**
3. **Watchlists can be viewed based on the holdings in your different groups. [See page 12 for more information.](#)**

Account Groups can be created in [My Profile](#). Use the **Edit** button and select **Add** to create as many groups as you prefer. When complete, save your changes.

To assign an account to a group, click on the **Edit** button in the **Account Nicknames** section. Use the drop down in the **Group** column to assign each account to a group.



3 - ACCOUNT GROUPS Cancel

Delete: Group Name

My Non-Registered

My Registered

Add Save

4 - ACCOUNT NICKNAMES Cancel

Account Nickname	Account Number	Short Name	Type	Group	Currency
Travel Money			Margin Long CAD	My Non-Registered	CAD
Trading			Margin Long USD	My Non-Registered	USD
			TFSA	My Registered	CAD
			Margin Long CAD	My Non-Registered	CAD
			Margin Long USD	My Non-Registered	USD
Retirement			RRSP	My Registered	CAD

How do I apply Nicknames to my accounts?

In [My Profile](#), accounts can each be given an **Account Nickname** to make it easy for you to differentiate between your multiple accounts. For example, you can name your registered plan account 'Retirement' and your CAD margin account 'Travel Money'. To add an **Account Nickname**, select the **Edit** button and simply enter a name in the **Account Nickname** column. If you have already set up your **Account Groups**, you can also assign the account to a group and then save your edits.

FAQ - ONLINE ACCOUNT ACCESS CONT.

How do I view a Watchlist based on my account holdings?

On the [My Accounts](#) page, use the drop down menu to select an account, **All Accounts**, or a specific account group. Click on the orange arrow button to generate a Watchlist.

NOTE: Your default can only be a Watchlist that is created manually.



FAQ - ONLINE ACCOUNT ACCESS CONT.

How do I create a customized Watchlist?

To create a Watchlist from **My Accounts** use the **Select a Watchlist** drop down menu. Choose **New** and click on the orange arrow button.



The **Watchlist Detail** box will appear. Follow steps 1 to 6.

1. Add **New** or **Edit** if making changes to existing list.
2. Give the Watchlist a name.
3. Click on **Add**.
4. Enter name or ticker symbol you would like to add.
5. Press the **Search** button.
6. Once security is chosen, it will be added to the Watchlist. **Save changes after each position is added** otherwise your new symbol will be lost.
7. Use the **Add More** button to continue building your Watchlist if you run out of fields.

1 Insert Symbols

Insert symbols that you know in these boxes to add to your Watchlist. Be sure to click **Save Changes** to update the Watchlist.

The screenshot shows the 'Watchlist Details' interface. At the top, there is a 'Select a Watchlist' dropdown with 'A Client- equity' selected, an 'Edit' button, and an 'Add New' button labeled '1'. Below this is a 'Watch List Name' field with 'A Client- equity' entered, labeled '2', and an 'Add' button labeled '3'. The main area contains a table with columns 'Symbol', 'Market', and 'Delete'. The first row has 'BCE TO' in the Symbol column and 'CDN Equity' in the Market column. Below the table are 'Add More*' and 'View Quotes' buttons. At the bottom is a 'Save Changes' button labeled '6'. To the right of the table is a 'SYMBOL LOOKUP' section with a 'Search By:' dropdown set to 'Name', an input field 'Enter name here' labeled '4', a 'Market:' dropdown set to 'CDN Equity', and a 'Search' button labeled '5'. A callout box labeled '2 Search Symbols' points to the 'Search' button, containing the text: 'Search by security name for a symbol that you would like to add here.'


* Please ensure your entries are saved before adding additional fields, otherwise your new entries will be lost.

FAQ - ONLINE ACCOUNT ACCESS CONT.

How do I set a default Watchlist and Pricing Options?

In **My Profile** use the **Edit** button to access the drop down menu. Select the Watchlist you wish to have as your default and then save your choice.

To default your pricing options, simply click on the **Edit** button, make your selection and click **Save**.



6 - DEFAULT WATCHLIST Cancel

Select one of your watchlists to display on your Market Data page.

My Watchlist Save

7 - PRICING OPTIONS Cancel

Market Value based on previous day's

Close Price Last Bid Price

Save

How do I set up my Online Account Access profile so that my spouse and I can see each other's account information?

This can be done by each spouse signing the other spouse's Online Account Access form. Please contact your Investment Advisor to have this set up.

How do I suppress my spouse's paper statements?

To respect privacy, every client who would like to suppress their paper statements must be enrolled in Online Account Access and sign the OAA form. Please contact your Investment Advisor to have this set up.